THE ROLE OF U.S. HISTORIC SITES AND MUSEUMS IN SUPPORTING SOCIAL STUDIES INSTRUCTION IN K-12 CLASSROOMS:

A QUALITATIVE STUDY

By

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Abstract

The role of museums and historic sites as institutions of informal learning has been interwoven with the delivery of social studies education since the National Council for the Social Studies and the United Sates Park Service were both formed in 1916. Places like George Washington's Mount Vernon, Gettysburg National Military Park and Thomas Jefferson's Monticello are integral to the preservation of our collective past and our common identity as a country. In the midst of a highly polarized political environment and the recovery from a global pandemic, social studies teachers in American classrooms are often on the front lines of the modern culture wars. In addition, state standards for the delivery of social studies education have been evolving to focus more on the development of cognitive practices and skills such as historical thinking and empathy and less on the rote memorization of specific dates and events. Teachers of history and social studies need support to effectively make this transition. This qualitative study looks at professional development opportunities for teachers at the three national historic sites names above as well as the National World War II Museum in New Orleans. Through a series of interviews with museum professionals and participating teachers as well as focus groups and informal observations of weeklong immersive experiences offered during the summer of 2022, the study seeks to understand the theories and frameworks that inform the delivery of such experiences and the ways that teachers internalize and act on what they learn. Based on the findings, teachers expressed a strong preference for this type of place-based experiential learning over more traditional methods of professional development. The multi-day seminars and institutes also made them feel appreciated and valued as professionals. Ideas and suggestions are offered for other museums and historic sites that might be interested in offering similar opportunities for educators in the future. Implications for designers of other

professional development opportunities at the district level are also discussed. Finally, areas for improvement and further research are identified and solutions are recommended along with an evaluation plan.

Keywords: Commemorative Museum Pedagogy (CMP), Contested histories, Discursive instruction, Historic site-based professional development (HSBPD), Historical empathy, Historical reconciliation, Historical thinking skills, Inquiry-based instruction, Interpretive planning

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Table of Contents

List of Tables

List of Figures

CHAPTER ONE: INTRODUCTION

"Study history, study history. In history lies all the secrets of statecraft."

– *Winston Churchill*

Civics education in American classrooms has historically been part of the social studies curriculum first introduced in 1916. At the time, the Committee on Social Studies organized by the United States National Education Association defined social studies as those subjects related directly to the social nature of humans and the organization and development of society with the goal of promoting good citizenship (Hardwick et al., 2010). Similarly, the Texas Council for the Social Studies, an affiliate of the National Council for the Social Studies, defines the subject as a "discipline of study focused on the interdependence of geography, history, government, economics, and civics in our society" (https://www.txcss.net, 2021). Thus, the link between social studies education and civic participation has been present since the subject was first implemented in classrooms across the country.

Today, there are many challenges facing teachers of both history and social studies who have the responsibility for educating and engaging an increasingly diverse student population who may or may not find themselves represented adequately or correctly in the curriculum. For example, a study conducted by researchers from Stanford University in 2015 and 2017 revealed that almost all of the historical figures included in U.S. History textbooks in Texas were white men rather than people of color even though the state, like many others, has changed dramatically in recent years with now more than half, 52.4%, of an estimated 5.4 million students identified as Latinx (Li, Demzsky, Bromley, & Jurafsky, 2020). The traditional approach to social studies and civics instruction has focused on patriotism and obedience with an

emphasis on memorizing specific bits of knowledge such as the Pledge of Allegiance, the structures of government and historical facts sometimes taken out of context (Payne, et al., 2020). Clay and Rubin (2020) argue that students from traditionally marginalized populations would benefit from a more "assets based" approach to civics and history education that draws on their unique experiences and creative teaching strategies such as "naming, questioning and demystifying."

To date, most of the research in history as well as social studies classrooms has focused on the content of the courses and on critical analysis of the material covered in textbooks, not on the cultivation of historical thinking skills, the development of student identity or the impact on civic engagement. In addition to a curriculum that some describe as a mile wide and an inch deep with an emphasis on rote memorization, the increasing political divisiveness in the country can also make constructive discourse in social studies classrooms both uncomfortable and potentially risky for educators. This study examined how history and social studies teachers on the frontlines in the classroom can engage in ongoing and high-quality professional development opportunities that build confidence in addition to helping them hone their instructional practices beyond content knowledge. Specifically, the study addressed the role that historical sites in the United States can play in fostering this engagement.

Background of the Problem

John Dewey viewed history and social studies education as a key component of the American democratic experiment suggesting that without an understanding of the events and errors of the past, humans are destined to repeat those same mistakes. In *Art as Experience*, Dewey states that "aesthetic experience is always more than aesthetic. In it a body of matters and meanings, not in themselves aesthetic, become aesthetic as they enter into an ordered rhythmic

movement towards consummation" (Dewey, 1980, p. 326). Dewey argues that, in fact, shared experience is critical to the preservation of democracy. He describes shared experience as a human good that through its rhetorical nature promotes both growth and change and thus impacts identity and the way that people see themselves and the role they play in any given community. The types of experiences that occur inside museums and at national historic sites can be representative of Dewey's concept of consummation when the impression that is made and/or the feelings that are aroused generate a response similar to those that occur in reaction to a significant piece of art (Dickinson et al., 2010).

Similarly, the American writer and theorist, Kenneth Burke, defined collective identity as a specific set of attitudes held in common by a group of individuals, and rhetorical experiences at places of public memory can profoundly impact and shape such attitudes. In other words, any experience where we are asked to create or make meaning can impact our attitudes which can then, in turn, lead to personal transformations both big and small (Dickinson, et al., 2010). With this idea in mind, prominent historic sites and museums can provide high-quality professional development opportunities for social studies and history educators that create place-based transformational experiences so that they in turn can do the same for their students.

Much like museums and their approach to interpreting the events of the past, the study of history has continued to change and evolve both as a practice and in its importance to educators, administrators and the public. Often driven by both political as well as economic forces, the subject has seen many reforms over the past 150 years. For example, in 1917 the Smith-Hughes Act added vocational courses as well as home economics to the curriculum (Bolinger & Warren, 2007). Guidelines for how the classes should be taught have also continued to change based on new standards introduced at both the state and federal level. According to Bolinger and Warren,

there are five best practices that emerge across the various standards. They include: “multiple representations or perspectives, appropriate methodologies, critical use of source materials, interdisciplinary methods and ability to construct new knowledge or sound interpretations” (p. 72). However, as indicated by Larry Cuban from Stanford in his book, *Teaching History Then and Now*, there is often a gap between what is considered to be best practice and what actually happens in the classroom where an overemphasis on passive rather and active pedagogy including worksheets and rote memorization of dates and facts is still quite common (Cuban, 2016).

Further, since the inception of standards-based educational reform following the publication of *A Nation at Risk* in 1983, much of the emphasis in U.S. classrooms has been on tested subjects such as mathematics and language arts (Kenna & Russell, 2014). This initially led to a reduced focus on the importance of social studies instruction which some research indicates has resulted in a diminished understanding of history and key historical events among both students and adults (Burroughs et al., 2005). In some ways, establishment of the Common Core standards in 2009 helped to re-emphasize the importance of social studies as a subject (Kenna & Russell, 2014). Led by the Council of Chief State School Officers and the National Governors Association, the Common Core standards were developed with a focus on college and career readiness or performance standards rather than content standards. Although not all states have adopted the Common Core standards, with Texas being one of a handful of states that did not, today, all 50 states have established standards for social studies including history, geography, civics/government and economics (Kenna & Russell, 2014).

Current National Council for the Social Studies (NCSS) standards stress that students, particularly at the high school level, should have the opportunity to “analyze, explain, interpret

and solve problems" (Bolinger & Warren, 2007, p.73). Many state standards also stress that an interdisciplinary approach to social studies instruction is desired. But in spite of this and the call for sophisticated instructional methods such as role playing, individual research and socratic inquiry, many teachers still emphasize objective content such as names, dates and facts in an effort to ensure that students perform well on the standardized tests described above (Bolinger & Warren, 2007). For example, through a survey of both elementary and secondary teachers in a mid-sized district in Indiana combined with classroom observations, researchers found that teachers spent the majority of social studies class time on lecturing, worksheets and individual projects and the least time on debate, role playing and student research, even though such strategies are often described as best practice (Bolinger & Warren, 2007). Elementary teachers in the study identified projects and discussion as the most effective teaching strategies while secondary teachers listed lecture and discussion at the top. Similarly, in a 1998 study of 48 high school social studies classes, researchers discovered that only about 1.5 minutes of class time was actually devoted to discussion and there was no discussion at all in more than 60% of classes (Nystrand et al., 1998). Basically, while teachers may recognize that more active strategies are preferred, they still rely heavily on passive strategies that more clearly translate into higher test scores. In a similar study conducted in 2000, Haas and Laughlin found that less than 5% of almost 600 teachers who participated in a survey they conducted in conjunction with the NCSS indicated that they use primary source documents as part of their instruction (Haas & Laughlin, 2000). Such findings could have implications for both teacher preparation programs as well as professional development programs, particularly those offered at museums and historic sites where primary source documents are frequently housed and displayed as part of a collection of artifacts that helps visitors to make sense of the past.

As recently as 2010, the same year that the NCSS national standards were last revised, research concluded once again that traditional instructional methods such as “lecture and homework from textbooks” are still the most prevalent in actual classroom practice (Kenna & Russell, 2014, p. 78). Beck and Eno had similar findings in 2012, finding that despite the recognition of active, student-centered strategies as best practice, passive approaches built around textbook content still dominated classroom practice. In addition to testing requirements, the breadth of the content standards and the amount of information to be covered is also a driver of instruction that promotes memorization versus deep learning. In addition to documented standards, many states now also have assessments, particularly at the high school level, to test student knowledge, but again the emphasis is often on rote memorization of dates, figures and facts instead of historical thinking in spite of the Common Core Standards placing more emphasis on both “cognitive processes and skill acquisition” (Kenna & Russell, 2014, p. 79).

Kenna and Russell (2014) suggest that both pre-service and in-service teachers are in need of additional training in order to be able to successfully meet such standards as they transition their practice away from traditional, textbook-based methods. Inquiry-based instruction requires that teachers move from the “sage on the stage” approach into one as coach and facilitator. Many educators need assistance in making this transition successfully (Yogev, 2013). In addition, the development of critical thinking skills and historical empathy in students can be difficult to measure. Thus, it is hard for teachers to know if they are doing it effectively (Carretero et al., 2012). Therefore, teachers need training and support in order to implement instructional best practices and new methods of assessment for history and social studies education.

Statement of the Problem

A great deal of time and money is spent each year on continuing education for teachers in Texas and across the country. Exact expenditures, however, can sometimes be difficult to measure depending on how they are tracked and coded at the district level (Chambers et al., 2008). Linda Darling-Hammond and her colleagues at the Learning Policy Institute at Stanford have conducted one of the most comprehensive three-part studies of professional development for teachers in the United States. In Part 2 of the study, they analyzed data taken from three administrations of the national Schools and Staffing Survey (SASS) that was conducted by the National Center for Education Statistics as well as a MetLife study conducted in 2009 to understand teacher perceptions of and participation in professional development (Hammond, et. al, 2010). They define professional development as "a comprehensive, sustained and intensive approach to improving teachers' and principals' effectiveness in raising student achievement" (Hammond, et al., 2010). In general, through their analysis of survey results they found that gains have been made in support for new teachers and principals, but for in-service educators traditional approaches such as conferences and one-day workshops, deemed not to have the same impact on classroom practice as those experiences that are job-embedded and sustained over a longer time period, still dominate the field. In the 2008 administration of the SASS, more than 87% of responding teachers reported participating in content or subject-based professional development and almost 70% rated the training as "useful" or "very useful," but only 24% participated in more than 33 hours, the benchmark in terms of best practice. In Texas, specifically, Hammond and her team found that 91% of teachers reported participating in content-focused professional development, but only 22% reported engaging for 33 hours or more. This is not entirely surprising given that the state requirement for teacher certification is

150 hours over five years or 30 hours per year (Chambers et al., 2008). Unfortunately, the SASS was altered following the 2008 administration, precluding further longitudinal studies of the data it provided.

In terms of district spending on professional development, Chambers and his colleagues identify two broad categories - traditional and integrated. Traditional approaches include conferences, college courses for credit, workshops and institutes while integrated approaches include study groups, collaborative networks, mentoring & coaching and professional internships and are generally thought to be more effective (Chambers et al., 2008). Chambers based his analysis of spending in six districts in the Southwest region of the U.S. on prior work done by Miles and Odden (Miles et al., 2004). In his original study on the topic in 2002, Odden developed a framework for coding expenditures at the district level using six categories - teacher time, training and coaching, administration, materials, equipment, facilities, travel and tuition and fees (Miles et al., 2002). Because these expenses are normally tracked across departments and not in one single location, they can be difficult to gather. Thus, Chambers and his colleagues as well as others have called for districts to utilize web-based tracking tools to more accurately capture the true cost of all professional development (PD) activities including teacher time for those that are embedded during the school day such as participation in professional learning communities. Some districts, including the two from Arkansas that participated in the Chambers study have started to do just that. Overall, they found that the six districts, including one large urban district from Texas, spent an average of 2% to 9% of total spending, the equivalent of $150 to $600 per student or between $2,475 and $8,670 per teacher (Chambers et al., 2008). Similarly, the study conducted by Miles and Odden in 2004 in the Northwestern region of the United States found that district spending on professional development varied widely from

approximately $1400 per teacher to over $7000 per teacher representing 2% to 4% of overall district spending (Miles et al., 2004). For the Texas district included in Chambers' research, professional development spending was an estimated $2,475 per teacher or $159 per student representing just under 2% of total district spending, below all other participating districts with the exception of one suburban school district in New Mexico.

In spite of the investment and the recognition that professional development for educators is important in terms of its potential impact on student learning, traditional approaches have not historically met the expectations or needs of teachers (Ball & Cohen, 1999). According to Linda Darling-Hammond and her colleagues, the majority of such experiences are short-term and passive and do not adhere to what the research reveals as effective in transforming actual practice (Darling-Hammond et al., 2017). Further, teachers of history and social studies may be at a particular disadvantage as opportunities for them may be overlooked or diminished in a world driven by standards-based reform and testing (Kenna & Russell, 2014). In the studies conducted by both Darling-Hammond and Chambers, there was no mention of PD activities or experiences focused on history or social studies. Instead, Hammond and her colleagues focused on reading instruction and computer-based instruction along with strategies for supporting students with disabilities and students with limited English proficiency (Hammond et al., 2010). Professionals at Museums and Historic Sites have an opportunity to probe further to understand exactly what social studies and history teachers need to help fill the gap between research and practice and how the specific skills and knowledge that they acquire actually impacts classroom practice. In the same way that Museums and Historic Sites seek to *bring history to life* through the display of artifacts and the development of exhibits that create a more immersive experience for visitors, they can also strive to establish an ongoing dialogue with teachers and to seek input

from practitioners in the development of materials and programs (Marcus, Stoddard & Woodward, 2017).

In Texas, even though history is considered a component of social studies as a subject, it is distinguished with separate requirements in terms of teacher certification. Specifically, teachers seeking certification in both history and social studies must pass a distinct content exam in addition to the traditional requirements including a bachelor's degree and passage of the basic certification exam (https://www.tea.gov, 2021). Teachers in the state must update their certification every five years by completing a minimum of 150 hours of continuing professional education (CPE) or professional development (Darling-Hammond et al., 2017). However, even though teachers are meeting the requirements to maintain certification, they may not have the education and support they actually need to improve classroom instruction.

Research indicates that teachers view museums as authoritative in the information they present which is good, but it can also diminish their desire to question and to think critically about their experiences at historic sites which can be a missed opportunity for educators and students alike (Baron et al., 2019). Through a survey of 94 secondary history teachers followed by a series of interviews, researchers at the University of Connecticut found that educators currently think of Museums and Historic Sites mostly as destinations for field trips which often are not integrated into the curriculum (Marcus et al., 2012). An estimated 60% of the teachers surveyed participated in a field trip during the prior year but also stated that both money and time can be a factor in limiting such trips. In addition, while teachers recognize historic sites as credible sources and places that promote experiential learning for students, more can be done to utilize visits to develop both historical thinking as well as empathy (Baron et al., 2019). In a report generated by the Bradley Commission on History in the Schools, historical thinking was

described as the ability for "students to see today's issues and events in relationship to the past; to understand that the history they study is not the 'truth' but a version of the past written by historians who do not always agree on the basis of analysis and evidence" (Gagnon, 1989, p. 55).

As museums shift from narratives that focus almost entirely on those in power to also include marginalized populations, educators have an opportunity to encourage students to think more critically about the story that is told (Dickinson et al., 2010). What choices did the curators and interpretive staff make about the content that is presented? What did they include and what did they leave out? Why? Such questions can be utilized to encourage students to explore how the values, beliefs and knowledge included in a given museum interpretation can be influenced by economic, social or political factors (Marcus et al., 2017). Framing such topics appropriately, especially those that can be contentious, is not always easy or straightforward and requires practice. Thus, teachers need support in embracing such strategies which can impact the way that they structure and manage classroom time and discussion.

Purpose of the Study

This study is informed by the work of Christine Baron et al. (2020) of Teachers College at Columbia University in assessing the knowledge and skills gained by teachers via their participation in historic site-based professional development (HSBPD) programs. This team conducted the first and only study of gains across multiple sites including Thomas Jefferson's Monticello and George Washington's Mount Vernon. They focused on "historical disciplinary inquiry-based programming" and its impact on the development of skills and dispositions in teachers that impacted classroom practice (p. 1). Over a three-year period using Q-methodology in pre- and post-interviews, they studied the impact of HSBPD on four specific domains: 1) historical thinking and analysis 2) historical pedagogical content 3) peer collaboration and

feedback and 4) general pedagogy using diverse perspectives. Overall, they saw the biggest impact on factors 1 and 2. Specifically, they found that through place-based instruction where teachers experienced "history in action" through contact with curators and public historians, they were able to see how new findings and discoveries in the field impact the interpretation of history in real time. Further, by engaging in dialogic instruction themselves, they reported a desire to transfer the same inquiry-based methods into their classrooms.

Baron et al. (2020) called for additional research to further understand the impact of HSBPD on teacher practice and that is where this study will begin. Specifically, the study will look at the utilization of the principles of andragogy in the design and delivery of experiential learning opportunities for teachers and the incorporation of the principles of best practice in professional development opportunities offered to educators at four well-known historic sites and museums – Gettysburg National Military Park, the National WWII Museum in New Orleans, Jefferson's Monticello and George Washington's Mount Vernon. These sites were all selected based on the breadth and quality of professional development experiences for teachers.

Research Questions

Two key research questions guided this study:

1. What principles and goals underpin the design and delivery of experiential learning for K-12 teachers at key U.S. historic sites and museums?
2. How do teachers experience, internalize and act on these educational opportunities?

Through a series of one-on-one interviews with leaders at each site, informal observations of a multi-day teacher training or workshop at each location as well as interviews and focus groups with participating teachers, the goal was to understand similarities and differences and to identify key components of HSBPD that seem to have the biggest impact on

classroom educators. Special attention was paid to teachers' perceptions of their own ability to implement what they learned with their students. What were the perceived barriers and enablers? The underlying premise explored was that teachers must first experience and practice a more discursive and inquiry-based approach to history and social studies instruction before they can successfully implement such strategies in the classroom. The idea is that museums and historic sites offer a rich, authentic environment for such learning and experimentation to occur.

Significance of the Study

This study examined the potential of museums and historic sites as informal educational institutions to work in partnership with local k-12 districts and teachers to 1) understand their needs in terms of professional development; 2) design and deliver authentic learning experiences accordingly, and 3) support teachers in the ongoing development of the skills required to successfully engage students in the practice of historical thinking. This is not a topic that has been studied extensively. This study is particularly significant given the increasingly political environment in which history and social studies education is embedded nationally as well as globally (Yogev, 2013).

The recommendations focus on transference to teachers and classrooms in Texas in particular because of its size and the volatile political environment, but they also may have application to other states across the country. In addition, one of the main purposes of the study is to help inform future programming at the Alamo state historic site in San Antonio as an ambitious $300 million redevelopment plan comes to fruition. Project leaders and planners have articulated a goal of becoming a world-class educational institution by working in partnership with local teachers and school districts in addition to providing a world-class experience for the millions of travelers who visit the site each year. Frequently referred to as the "Shrine of Texas

Liberty," and the site of the famous battle that took place in 1836 between the vastly outnumbered Texians and the Mexican Army, the Alamo remains embattled today as arguments over the way that our collective past is taught and remembered heat up in Texas and across the nation.

In addition to pedagogical challenges and vast amounts of material to cover according to state standards, the political environment in Texas presents yet another very real obstacle for teachers of history and social studies as well as the team leading the Alamo redevelopment project. In May of 2021, Texas became one of five states to pass a bill, HB 3979, designed to discourage k-12 educators from teaching students about Critical Race Theory (Kim, 2021). Like many of the bills introduced in more than 25 states over the past year, HB 3979 is rather loosely worded and based on model legislation developed by the conservative Think Tank, Manhattan Institute, in response to any curriculum that suggests that the U.S. is fundamentally racist and that certain individuals, based on their skin color, are inherently racist or personally responsible for past acts of racism (Copland, 2021). In fact, Southlake, Texas, a suburban community outside of Dallas, made national headlines in May of 2021 when the school district's "cultural competence plan" became the center of debate during hotly contested races for the school board, the city council and the Mayor's office. Angry exchanges between parents, teachers and elected officials were featured in the NBC podcast series, *Southlake*. As stated by Kim, former deputy assistant secretary in the Office for Civil Rights at the U. S. Department of Education, the concern over the clash between politics and the curriculum in k-12 public schools is the potential impact on "schools' efforts to encourage students to think critically about the history and the impact of race, gender and systemic inequality in the United States" (Kim, 2021, p.65).

Texas is a state known for its tremendous pride, viewed by some as an extreme version of exceptionalism. Residents frequently refer to themselves as Texans first and Americans second and Texas history is taught with focus and intention in mandatory courses for all 4th and 7th graders in addition to U.S. history classes offered in other grades. In addition, Texas is one of only 10 states where members of the State Board of Education are elected during a statewide, partisan election (Williams & Maloyed, 2013). The state also captured national headlines in 2010 for the highly political process by which revisions to school standards known as the Texas Essential Knowledge and Skills (TEKS) were made by the elected Board, and Williams and Maloyed suggest that the decisions they make can have an impact on curriculum and content beyond the state's borders because of Texas's size and influence on textbook publishers.

History and social studies teachers in Texas and nationally are in need of support and professional development experiences that equip them with the tools and resources to effectively confront the challenges they face. To the extent that this study can offer key insights for museums and historic sites to effectively offer such experiences, teachers across the state will undoubtedly benefit as will teachers in other parts of the country. In addition, districts may benefit in that the insights could drive the creation of higher quality professional learning at a reduced cost.

Organizational Field Context

This study includes a total of four well-known historic sites and museums across the United States - Gettysburg, the National WWII Museum in New Orleans, Jefferson's Monticello and George Washington's Mount Vernon. These sites were selected based on their reputations for delivering high-quality educational programming for both students and teachers. Specifically, each one offers a variety of experiences and learning opportunities for k-12 educators that are

competitive and in high demand. Two of them – Monticello and Mount Vernon – were the focus of the only multi-site analysis of HSBPD that has been conducted to date. Like many historic sites, Gettysburg National Military Park is operated by the National Park Service in partnership with a non-profit organization that helps to raise money for programs and capital projects. For the study, each location will be identified by a specific number.

Site One – The Gettysburg Museum of the American Civil War is located at the Gettysburg National Military Park and includes 22,000 square feet of exhibit space housing one of the world's largest collections of artifacts from the Civil War (https://www.nps.gov/gett/planyourvisit/visitorcenters.html). The museum includes items from the Battle of Gettysburg with a focus on important historic figures who served in the Civil War. It also features interactive exhibits and multi-media presentations as well as a Cyclorama experience that describes the battle and its bloody aftermath in great detail. From suggested reading to field trip preparation tools and a series of in-person as well as virtual workshops, they offer a variety of professional development opportunities for teachers.

Site Two – The National WWII Museum in New Orleans "tells the story of the American experience in *the war that changed the world*—why it was fought, how it was won, and what it means today—so that all generations will understand the price of freedom and be inspired by what they learn" (https://www.nationalww2museum.org/about-us/mission-vision-values). According to their website, they were named by *USA Today* as one of the "Best Places to Learn U.S. Military History." They offer a series of curriculum guides and other resources for teachers with a special emphasis on Science, Technology, Engineering and Mathematics (STEM) programming. Teachers can create their own virtual classroom on their website and choose from a number of summer workshops and intensives. Both the Visitor Center and Museum at

Gettysburg and the National WWII Museum were designed by Gallagher and Associates, the same firm working on the new Visitor Center and Museum at the Alamo in San Antonio, Texas.

Site Three – The Thomas Jefferson Foundation was created in 1923 to restore Monticello and to share Jefferson's ideas with a national and global audience. Since its founding, the Foundation has welcomed nearly 27 million visitors to the historic home, now designated as a United States National Historical Landmark and a UNESCO World Heritage site (https://www.monticello.org/get-involved/?ref=pnav). The David M. Rubenstein Visitor Center and Smith Education Center serves as the "21st-century gateway" to Monticello by preparing guests for their trip to the historic mountaintop (https://www.monticello.org/exhibits-events/exhibits-at-the-visitor-center). They offer virtual field trips and tours for teachers as well as a digital classroom and a special Teacher Institute held during the summer.

Site Four – Mount Vernon is the former plantation estate and burial location of George Washington, the first President of the United States and American Revolutionary War general, along with his wife Martha and 20 other Washington family members (https://www.history.com/topics/landmarks/mount-vernon). The current estate includes a mansion, gardens, tombs, a working farm, a functioning distillery and gristmill plus a museum and education center that houses 23 galleries and a 4D Theater. The Mount Vernon Ladies Association, founded in 1853 by Ann Pamela Cunningham, owns and maintains the estate after purchasing it from Washington's heirs in 1858 for $200,000 with the goal of saving the plantation and preserving its history. Like the other sites, they offer a variety of support materials for teachers online as well as professional development opportunities that take place at Mount Vernon as well as other venues across the country. They also host a teacher residency program, a fellowship program and a History Teacher of the Year Award.

Of the four sites, three are true historic sites. Gettysburg is operated by the National Park Service and two, Mount Vernon and Monticello, are owned and operated by a separate non-profit preservation organization, The Mount Vernon Ladies Association and the Thomas Jefferson Foundation respectively. The remaining site is a museum with a focus on pivotal events in history, many of which occurred on foreign soil. With this background, it was important to observe the similarities and differences in how each institution approaches their work with k-12 educators.

In particular, the goal was to determine how the practices and strategies related to providing teacher professional development and supporting social studies instruction in K-12 classrooms at the five institutions can be applied to the Alamo in San Antonio, Texas, as well as other museums and historic sites around the state and the country. The Alamo is best known for the historic 13-day battle that took place in March of 1836 between a group of volunteer Texian soldiers fighting against the Mexican Army that led to the Texas Revolution. Of the approximately 187 Anglo and Tejano settlers who participated in the battle, the most well-known are William B. Travis, James (Jim Bowie) and Davy Crockett, a former Congressman from Tennessee referred to as the "king of the wild frontier." Most visitors do not know that before it was a fort, the Alamo was a Spanish Mission, Mission de Valero, first established in 1718 and prior to that, it was occupied by groups of indigenous bands and clans referred to as the Coahuiltecans because they occupied the region known then as Coahuila, Mexico and all spoke a similar language. Following the famous battle, the Alamo became a depot for the United States Army and at the turn of the 20th century, it was one of many historic sites around the country that became part of a national preservation and conservation movement, led primarily by women such as the saviors of the Alamo and founders of the Daughters of the Republic of Texas, Clara

Driscoll and Idina De Zavala. The goal of the $300 million Alamo redevelopment plan that is currently underway is to tell the complete 300-year history of the site through the creation of a world-class visitor experience combined with world-class educational outreach and programming.

Definitions

Many of the terms listed below related to instructional practice and museums will be used in the chapters that follow. A brief definition of each is offered for clarity and to provide a foundational understanding of the key concepts utilized in this study.

Commemorative Museum Pedagogy (CMP)

CMP is the five-step process staff members and visitors at museums go through when confronting and processing contested or difficult historical events and people: 1) reception 2) resistance 3) repetition 4) reflection and 5) reconsideration (Rose, 2016).

Contested Histories

Contested histories in public spaces refers to the way that historical narratives are presented to the public in museums, monuments, texts, and festivals (Dickinson et al., 2010).

Discursive Instruction

Discursive instruction refers to the creation of classroom community through discourse, defined as both written and spoken expression of knowledge or individual points of view. The facilitate–listen–engage (FLE) model is one example of such a pedagogical approach designed to create a discourse-intensive community of learners.

Historic Site-Based Professional Development (HSBPD)

HSBPD refers to place-based continuing education experiences for teachers offered at historic sites (Baron et al., 2020).

Historical Empathy

Historical empathy refers to students' cognitive and affective engagement with. historical figures to better understand and contextualize their lived experiences, decisions, or actions. Historical empathy involves understanding how people from the past thought, felt and made decisions (Carretero et al., 2012).

Historical Reconciliation

Crowley and Matthews (2006) define historical reconciliation as the "process and practice of recognizing and addressing histories of racism and its effects" (p. 263).

Historical Thinking Skills

According to the American Historical Association, there are five skills that students should gain from history and social studies classes: 1) chronological thinking 2) historical comprehension 3) historical analysis and interpretation 4) historical research skills focused on the utilization of primary sources and 5) historical issues – analysis and decision-making (https://www.historians.org).

Inquiry-Based Instruction

Inquiry-based teaching is a pedagogical approach that invites students to explore academic content by posing, investigating, and answering questions. The 5E Inquiry-Based Instructional Model used to support STEM instruction, in particular, is based upon cognitive psychology, constructivist theory to learning (Bybee & Landes, 1990). The 5E learning cycle leads students through five phases: Engage, Explore, Explain, Elaborate, and Evaluate.

Interpretive Planning

Interpretive planning is a strategic process used to define the interpretation and education goals of a park or museum. The interpretive plan includes goals and actions to create meaningful

visitor experiences, to meet management goals, and, in many cases to balance resource or artifact protection with visitor use and enjoyment (Meringolo, 2012).

Public History

Public history is the use of historical thinking skills and methods outside of the traditional academic realm of history (Meringolo, 2012).

Organization of the Study

This study examines the design and delivery of professional development for K-12 educators at historic sites and museums and reactions from participating teachers in such programs. The analysis is presented in five chapters. Chapter One introduced the challenges facing teachers of social studies and history in the U.S. and specifically in Texas and highlighted the current gap between research and classroom practice. Chapter Two provides a comprehensive review of the literature regarding museums and historic sites as educational institutions and their role in providing place-based continuing education for teachers. Chapter Three includes an overview and description of the methodology and research design for this particular study. Chapter Four presents the findings from the data collected through interviews, observations and focus groups. And finally, Chapter Five provides conclusions and recommendations for current museum professionals designing experiential learning opportunities for educators as well as for future researchers interested in a similar or related topic.

CHAPTER TWO: REVIEW OF THE LITERATURE

The problem of practice being studied is the role of historic sites and museums in providing professional development for educators that builds historical thinking and empathy in students. The premise is that teachers must first experience the type of inquiry-based, dialogic instruction required to build historical reasoning skills in students as a learner before they can successfully implement the strategies in their classrooms. This chapter begins with an overview of the creation of historic sites and museums as educational institutions in the United States and the political and economic factors that led to the creation of the National Park Service (NPS). The history is followed by a discussion of the role that narratives play in interpretation at historical sites and museums across the country and how such narratives impact both national identity and public memory. Next is a discussion of the challenge faced by storytellers and museum professionals at sites with contested histories and the practice of historical reconciliation as well as CMP. Several examples are provided of historic sites and museums that try to tackle stories with layered histories in different contexts. The examples are followed by a brief history of Social Studies instruction in the United States, the gap that currently exists between research on best practice in terms of discursive and inquiry-based instruction and what actually happens in K-12 classrooms and implications for museums and historic sites. The chapter continues with a review of the literature regarding implications for professional development for teachers to help them close the gap between research and practice with a focus on managing classroom discussions pertaining to controversial public issues (CPI). The literature review concludes with a look at how museums and historic sites can play an integral role in this process by engaging with teachers in ways that extend far beyond the typical field trip. Finally, Kolb's Theory of Experiential Learning as well as Knowles' pillars of andragogy or adult education are explored.

Evolution of Historic Sites and Museums as Educational Institutions

The role of Museums and Historic Sites as educational institutions and places of public memory is evolving and has changed since their very inception in the latter part of the 19th Century. Following the end of the Civil War, many Americans experienced a sense of cultural upheaval as the country struggled to come back together. Science rose to the top of the national agenda as a concrete and fact-based counterbalance to the national sense of uncertainty about the future (Meringolo, 2012). The government began to invest more heavily in both higher education through the Morrill Act which established a number of land-grant colleges through the sale of federal land originally held by native tribes as well as specific research-based disciplines including the natural sciences and history. Simultaneously, the creation of Yellowstone in 1872 followed by the passage of the Antiquities Act in 1906, established the role of government in setting aside and preserving large sections of land that were deemed to be both beautiful and scientifically significant (Meringolo, 2012). In essence, America was both shepherding in a new era of scientific discovery and industry while also trying to protect its natural history and in some ways its agricultural and rural roots.

Initially, the 40 sites that were established by the Antiquities Act were guarded by the U.S. Calvary, but still there were incidents of damage and theft that indicated that the fragile lands and artifacts would benefit from a different kind of stewardship focused on both education and research. This led to the creation of the National Park Service (NPS) in 1916 (Meringolo, 2012). Through the leadership and vision of a number of innovative administrators, archaeologists and historians, exhibits and small museums were added to many of the locations as well as programs such as “campfire talks and archaeological demonstrations” that first introduced the idea that history could serve as a “public good” and ultimately led to the creation of the field of public

history (Meringolo, 2012). Throughout the 20th century, however, there was an ongoing divide between academic historians and those that worked in and for the government with the first being seen as more serious and prestigious than the latter. The lack of respect for public or government historians was further exacerbated by the emphasis on archaeology as the most important discipline practiced in the parks themselves (Meringolo, 2012).

In 1894 and 1899, two reports from the American Historical Association (the same organization battling the Park Service historians in their quest for status) stressed that history itself is both inquiry-based and analytical as a discipline. In a detailed report published in 1903, historian Charles McMurry outlined instructional methods designed to "bring the past into manifest relation to the present" (Bolinger & Warren, 2007). "Historical studies, properly conducted," he argued, "lead to a thoughtful weighing of arguments, pro and con, a survey of both sides of a question so as to reach a reasonable conclusion" (p. 68). Thus, from its very inception, social studies instruction was envisioned to be critical in nature and dialogic in practice. As more and more students began to graduate from American high schools, many experts including John Dewey and others stressed the importance of the public schools in supporting citizenship education and the "social welfare of the nation" (Bolinger & Warren, 2007). In 1916, the same year that the Park Service was officially created, the National Council for the Social Studies (NCSS) was also formed as a result of a commission created by the National Education Association calling for the development of a specific curriculum labeled "social studies" and to include geography, history and government (Bolinger & Warren, 2007).

Also immediately following the turn of the Century, "historic preservation" began to rise in popularity, led mostly by women who sought to "save" some of the country's most important historical artifacts and structures, particularly the homes of the nation's Founders (Meringolo,

2012). This movement led to the creation of dozens of local preservation and conservation organizations that helped to raise the necessary funds and provided the leadership to conserve the places and spaces valued most by the community. Coincidentally, this is also the time period when San Antonio philanthropist, Clara Driscoll, and Idina DeZavala led the charge to save the Alamo, the site of the most famous battle fought during the Texas Revolution in 1836. Ultimately, the majority of these historic sites would fall under the direction of the Park Service for their long term care and management.

In the 1930s, many of the Parks benefited greatly from the passage of the New Deal and the creation of the Civilian Conservation Corps which helped with a variety of improvement projects including the construction of roads and new facilities to enhance the visitor experience as attendance continued to rise (Meringolo, 2012). During World War II, however, as the country's resources were redirected to support the war effort, investment in the Park Service as well as attendance declined. Following the war, increased automobile ownership and suburban growth drove a resurgence in both. Between 1956 and 1966, a total of 50 new parks were added and a total of 56 new Visitor Centers were built through an aggressive program called Mission 66 (Meringolo, 2012). Then, in 1966, Congress passed the National Preservation Act and created the National Registry of Historic Places, building on the idea that Americans would benefit from understanding the full story or "narrative of progress" of the country's development and history, instead of singular events treated in isolation. This led to the placement of multiple historic sites under the Park Service and also further solidified the "thematic" approach to history first adopted by the agency in 1936 that would also inform the future discipline of museum studies. The NPS approach emphasized the critical importance of specific people in "shaping the natural and

cultural world" and laid the groundwork for the modern approach to museum design and the notion that history must be "interpreted" for visitors (Meringolo, 2012).

The Role of Interpretation in Shaping Public Memory and Identity

Many contemporary museums strive to organize themselves around a public narrative and a more progressive interpretation of historical events and people. This is a departure from the romantic/patriotic creation of national identity traditionally deployed by museums. Carretero and his fellow researchers (Carretero et al., 2012), define three separate approaches associated with national identity starting with the romantic view, an approach developed in the mid-19th Century and focused on promotion and preservation of the nation state. The second approach is defined as "empirical" or academic and gained popularity in the 1970s, treating history as the "transmission of knowledge" mostly centered around key dates, people and events (p. 4). This approach led eventually to current debates about exactly who and what should be included in school textbooks. The "civic approach" is the third and final concept constructed around the idea that history education is mainly about building "civic competence" in students. Some refer to this as "everyday history" because students do not retain all of the material covered through formal education and school is not the sole influence on their ideas of individual and collective identity. Museums and historic sites as spaces that promote informal learning also play a key role in the development of culture and identity. But traditionally, many museum narratives, like classroom instructional materials, were created to preserve existing cultural norms, often including ideas of white nationalism and preservation of existing power structures, rather than challenge them (Dickinson et al., 2010).

In addition, because of the link to government funding at both the state and federal level, there are political implications for the narrative that is told at historic sites in particular. Curators

and educators make intentional decisions about what is included and what is not, and these decisions can sometimes be influenced by funding streams as well as political actors. To the extent that museums and historic sites serve as places of public memory, they have a critical role to play in shaping not only the local and national narrative but also the "collective identity" of Americans (Grusin, 2004). According to Grusin (2004), the beliefs and ideas that comprise public memory help people to make sense of the events of the past and also have implications for how they will interpret the future. As the country struggles to understand and explain some of the most controversial aspects of its history such as the treatment of indigenous people and slavery, museums can sometimes be caught in the middle (Grusin, 2004). According to research conducted by historian David Thelen in the late 1980s, Americans trust history museums and historic sites more than any other source in helping them to understand the past (Thelen, 1989). Therefore, the responsibility that museums and historic sites have to be accurate and authentic as well as inclusive cannot be overstated.

Some researchers go so far as to argue that storytelling is actually the primary work of museums (Bedford, 2001). According to the psychologist Jerome Bruner, stories are integral to the acquisition of language in young children and to the making of meaning for adults. Even more than the narrative itself, stories invoke the individual thoughts, ideas and feelings of the listener or in this case, museum visitor. In this way, museum experiences are designed to be constructivist in nature with visitors shaping and developing their own perspective as they observe, read and learn. Perhaps one of the most powerful examples of this interpretive approach is at the United States Holocaust Memorial Museum in Washington, D.C. Upon arrival, visitors are assigned a "person" from the war and they follow that individual's story throughout their journey, creating a somber and personalized learning experience. The founding director of the

museum, Jeshajahu Weinberg, took great care in developing the language for the exhibits by removing any "affective" verbiage that might suggest how the visitor should feel – instead letting the response be completely organic (Bedford, 2001). In some cases, the narrative can also become dialogic, encouraging visitors to actively participate by contributing their own thoughts or stories. The museum narrative that is created can also extend into public programming for teachers and students as well as the general public. At the Detroit Historical Museum, storytellers and musicians are sent out to the public school through a program called "Detroit Storyliving" to utilize the English technique known as "process drama" to work with teachers and students to recreate an authentic journey on the Underground Railroad (Bedford, 2001).

Contested Histories and Reconciliation

The development of narratives at historic sites with contested histories can be particularly challenging. As noted by Winston Churchill, history is both messy and mysterious (Lewis, 2015). Unlike math or science, there is not a universal truth when it comes to history. Rather, it is shaped by the perspective and experiences of the individual and also reveals itself over time (Rose, 2016). Through her work at the Magnolia Mount Plantation in Louisiana, Julia Rose developed a framework for creating an overall interpretive approach to difficult histories known as CMP. At its core, CMP is built around the notion that processing controversial or contested histories is a process and museum curators and educators should both respect and respond to the reactions of individuals as they internalize the stories that are provided.

Rose recognizes that there is loss involved in letting go of long accepted truths in order to embrace new, more nuanced information and that loss can invoke feelings of anger, mourning and melancholia. In order to support visitors, she suggests that museum professionals be trained to recognize the five steps: 1) reception 2) resistance 3) repetition 4) reflection and 5)

reconsideration (Rose, 2016). Because of the potential impact on personal and collective identity the assimilation of new historical information can have, Rose argues that visitors should be given the space and time to work through the five steps. At the National September 11 Memorial and Museum in New York City, for example, multiple spaces and interactive exhibits are offered throughout the galleries for visitors to sit with the content, to listen to oral histories and to view personal letters, cards, artifacts and artwork in order to reflect on what the experience means to them.

Rose offers clear behavioral indicators for each step in the CMP process and suggests that the reward of presenting such topics far outweighs the risks because of the potential impact on the future as long as museum leaders and exhibit designers adhere to the highest ethical standards. These standards come into play as decisions are made about the faces (people), real content (objects and artifacts) and narratives (stories) that are either included or excluded. Rose calls on museum leaders to "brush history against the grain" in order to truly capture the perspective of the "Other" meaning historically marginalized groups and populations and the power structures that enabled the specific conflict or oppression to occur (Rose, p. 116). She states that "Commemorating human experiences in museums and public history venues provides present generations with opportunities to learn how particular histories are relevant today, thereby engendering courage, hope, justice, generosity, compassion, respect and temperance in visitors and all learners. Possibilities for increasing human virtue are located at the nexus of ethics and historical representations." (Rose, p. 101).

Storytelling in Practice

Building on the notion that museums are pedagogical in nature, Avner Segall writes about the process of including and promoting certain people, artifacts and stories over others through a

comparison of the approaches used at the National Museum of the American Indian (NMAI) and the United States Holocaust Memorial Museum (Segall, 2014). As stated by Segall, "the stories developing teams and curators choose to tell, as well as those they gloss over and 'forget form a curriculum that conveys – explicitly, implicitly and by omission – particular messages about history, power, knowledge and identity, helping position those who encounter those stories to think about the world in some ways rather than others" (Segall, p. 55). Segall suggests that the narrative presented in the NMAI is more fragmented than that of the Holocaust Museum because it was created by a variety of representatives from native communities versus a team of professional curators. Even though the two institutions employ very different approaches, Segall argues that both tend to skirt some of the most difficult aspects of the histories they are trying to convey.

At the NMAI, Segall suggests that the violence and genocide that accompanied European exploration and the settling of the Americas is glossed over or painted in a more flattering light than the facts might suggest based on the millions of lives that were lost. From his point of view, the spatial arrangement, lighting and placement of objects within the exhibits steers visitors down a path that is easier to reconcile with their existing knowledge and, therefore, to accept. The "removal" of American Indians is portrayed in the context of mutual violence and war with the actions of the Army described as justified and patriotic and the resilient Native Americans persevering and ultimately recapturing their way of life. In terms of the Holocaust Museum, Segall questions whether its location in the midst of other prominent American memorials is appropriate given the fact that the events actually took place on foreign soil. He also questions the distinctly American lens through which information is presented such as the U.S. troops liberating prisoners in the Nazi concentration camps. He does acknowledge that the museum

includes information about the country's slow response to enter the war and specific events where the U.S. might have intervened but argues that the Museum does not cross over into the "uncomfortable" zone to deal with the role of both Christianity and racism in the Holocaust. In other words, visitors, while moved and educated by the experience, leave with their traditional notions about what it means to be an American intact. He further alludes to the lack of connection between the building and its surrounding environment, a physical manifestation of the missed opportunity for visitors to make connections between the past and the present. Instead, the atrocities of the war and the political and economic factors that led up to it are treated as a distant memory instead of a reminder to not repeat the same mistakes again. Finally, Segall argues that the treatment of the Holocaust as an American memory where the country is the liberator and savior enable visitors to discount the horrific parts of our own history such as systemic racism instead of taking responsibility. In this way, both museums allow visitors to remain firmly in the "comfort zone" (Segall, p. 68).

Crowley and Matthews (2006) define historical reconciliation as the "process and practice of recognizing and addressing histories of racism and its effects" (p. 263). Both Australia and South Africa, as part of the Commonwealth of Nations, have histories that include the separation of people based on race, restricting their rights and their access to opportunity. However, South Africa has chosen through the creation of places and spaces such as the Apartheid Museum in Johannesburg and the Hector Pieterson Museum in Soweto, to tackle its history in a direct and participatory way while Australia has opted for a more "practical" form of reconciliation (Crowley & Matthews, 2006). Both nations began their journey toward reconciliation through government intervention and the realization that something had happened in the past that needed to be addressed. However, according to Crowley and Matthews, recognition and education are

not enough. True historical reconciliation can require a state or a nation to review and reevaluate its entire history and the way that its story has been told or the "demolition of colonial truths" (Crowley & Matthews, p. 271). Baliber suggests that we typically compartmentalize the complexity of race and racialization into ideas of difference, otherness and exclusion without truly understanding the relationship to "nationalism, imperialism, social and biopolitical exclusions" (Baliber, 2005). Museums, as a pedagogical intervention, have the opportunity to play a key role in the reconciliation process through memorialization, archival construction and the presentation of past horrors including violence and trauma. As discussed above, however, museum professionals are called upon to remember that visitors, including teachers and school groups, bring their own experience and world views shaped by the "global flow of information, images and imaginings" when they arrive (Crowley and Matthews, 2006, p. 268).

Alcatraz offers an example of a site with a layered history where decisions about what to include and what to emphasize have implications. From the very beginning of the visitor experience at the ferry landing on San Francisco Bay to the interpretive signage throughout, the role of the site as one of the country's most infamous penitentiaries is emphasized over both the usage of Alcatraz Island as a former military fort and prison during the Civil War as well as the Native American Occupation that occurred from November of 1969 to June of 1971 (Dickinson et al., 2010). Some scholars consider the Occupation one of the most significant events in the ongoing struggle between the U.S. Government and the American Indian population as well as an important example of peaceful protest. Articles written by members of Indians of All Tribes, Inc., the organization that led the protest, cited the lack of access to quality education and the high suicide rate among Native Americans as the reason. The introductory video that greets visitors, however, mentions the occupation only briefly and attributes the event to the type of

civil disobedience common during the 1960s rather than explaining its context within the longer narrative of treatment of indigenous populations throughout American history (Dickinson et al., 2010). As visitors make their way through individual cells and up to the cellhouse tower, the story of the protest gets lost as the experience focuses on what life was like as a prisoner behind bars. Dickinson et. al. (2010) characterize this as a "missed opportunity" to educate the more than 1.3 million people who visit the site each year about the full, layered history of the island.

As described in the work of the Detroit History Museum, the power of place associated with museums and historic sites can extend well beyond their physical presence and the visitor experience that is offered. Community programming allows museums such as the National Jazz Museum in Harlem (NJMIH) to extend their reach beyond their four walls. Dedicated to the idea that "music is a living, breathing entity that looks as far into the future as it does into the past," the NJMIH works with local schools and churches to deliver performances and programs that bring the organization's mission to life (Dickinson et al., 2010). Their programming is civic at its very core because it is offered in the places where people learn and worship. They literally bring the museum to the visitors instead of the other way around, allowing people to experience jazz and its continued evolution in the Harlem community in their own neighborhoods. Through the sharing of oral histories in a program called "Harlem Speaks" and a series of free concerts called "Harlem Swings," they work to change attitudes toward not just jazz music or Harlem, but also toward the broader African American community. One program, in particular, called "Harmony in Harlem" encourages teens to work together to play and understand jazz music as well as each other. The NJMIH uses both music and talk to create shared meaning and promote a deeper understanding of both the present and the past in order to inform the future (Dickinson et al., 2010). It represents one example of how a Museum can partner with the local community,

particularly with schools, to both inform and shape public memory and develop historical understanding in both students and adults. In other words, museums and historic sites, as places of informal education, have the opportunity to build upon what students learn in the classroom and to create meaningful and lasting experiences. In fact, while the responsibility for educating children about the country's past and the ideals upon which it was founded remains primarily in the nation's public school, museums and historic sites could play a bigger role as places where history actually occurred and where it comes to life. However, in order to partner effectively, museum educators and professionals should first understand what actually happens in the classroom and how it has changed over time.

Social Studies Instruction in the United States

The creation of the Park Service to manage designated public lands and Historic Sites for the purposes of research and education and Social Studies instruction in American public school classrooms has been linked since the beginning. Both essentially evolved simultaneously at the beginning of the 20th century (Meringolo, D.D., 2012). As the Park Service grew and evolved, so too did social studies as a classroom subject. Often driven by both political as well as economic forces, the subject has seen many reforms over the past 150 years. For example, in 1917 the Smith-Hughes Act added vocational courses as well as home economics to the curriculum (Bolinger & Warren, 2007). Guidelines for how the classes should be taught have also continued to change based on new standards introduced at both the state and federal level. According to Bolinger and Warren, there are five best practices that emerge across the various standards. They include: "multiple representations or perspectives, appropriate methodologies, critical use of source materials, interdisciplinary methods and ability to construct new knowledge or sound interpretations" (p. 72). However, as indicated by Larry Cuban from Stanford in his book,

Teaching History Then and Now, there is often a gap between what is considered to be best practice and what actually happens in the classroom where an overemphasis on passive rather and active pedagogy including worksheets and rote memorization of dates and facts is still quite common (Cuban, 2016).

Managing Constructive Discourse in Social Studies Classrooms

It is not a new idea that history and social studies instruction should be grounded in inquiry. In fact, back in 1916, the National Education Association's Commission that re-organized secondary education to include social studies envisioned that it would be a course where the challenges of democracy could be debated and discussed (Hess, 2002). However, in today's divisive political climate, a lack of personal efficacy and empowerment can make it challenging for teachers to tackle historical topics with implications for current events in public school classrooms. This is exacerbated by a general lack of confidence in the ability of teachers to successfully manage such conversations. In addition to prohibitions on what can be taught in the classroom, teachers may doubt their own skills and abilities in managing difficult conversations with students as well as parents.

There are existing models that can serve as helpful guides for creating constructive classroom discussion around CPI, but teachers may not know about them or be trained in how to use them. In a case study involving three educators in different schools, Hess describes three distinct approaches. At New Horizons High School, Joe Sparks teaches a yearlong seminar focused exclusively on some of the most consequential decisions of the U.S. Supreme Court (Hess, 2002). Students read the decisions along with the dissenting opinions, write about them and then participate in multiple class discussions. The premise is that the dialogue is more substantial when the students are all working from the same text. Sklarwitz and his colleagues

also illuminate the use of primary source documents such as the Constitution and the Declaration of Independence as foundational to history instruction, particularly at the secondary level (Sklarwitz et al., 2019). Mr. Sparks uses focus questions to guide the discussion and encourages students to use real examples from the text to support their arguments. Students who do not complete the writing assignment which serves as their admission ticket to participate in the discussion serve as observers, counting the contributions of their classmates even though Mr. Sparks does not give them a formal grade on their participation in order to not limit the conversation (Hess, 2002).

In contrast, Elizabeth Hunt uses the Public Issues model developed at Harvard to guide the discussion in her eighth-grade social studies class. The model, created during the Harvard Social Studies Project in the 1960s, focuses on three distinct sub-issues – factual, definitional and actual – to facilitate either small or large group discussions where participants deal with "some of the core tensions between core democratic principles (Hess, 2002, p. 22). Ms. Hunt teaches students the model at the beginning of the year and uses articles on specific topics which are distributed in advance to provide the content for the discussion. Students are reminded at each session to adhere to their mutually created guidelines – "listen, participate, invite others in, be responsible, be open-minded and show respect" (Hess, 2002, p. 23). Like in Mr. Sparks' class, students are encouraged to argue both sides of a topic in a concept he calls "trying on ideas," but Ms. Hunt does grade her students on their participation based on a defined rubric.

Finally, Ann Twain uses the Town Meeting model designed specifically for large group discussions. She also uses articles and text on topics ranging from gun control to the decision to use the atomic bomb, but in this model, students have input into the topics that are selected and they assume the role of a specific individual during the discussion. Each student is provided with

a packet of individualized reading material based on the role he/she will be playing with some being pro and some being con. Ms. Twain also uses a scoring rubric based on three criteria: "knowledge of subject matter, portrayal of role and effectiveness as a participant" (Hess, 2002, p. 27). Hess describes several key takeaways in regard to instruction using CPI: 1) Teachers treat discussion as both a method and an outcome in developing critical thinking and interpersonal skills in students; 2) Teachers maintain an objective stance and their personal views and opinions are not part of the discussion; 3) Students have ownership over the discussion, perceiving it as their forum versus the teacher's; 4) Teachers select a model or a facilitation style based on their learning objectives for the class; 5) Teachers are intentional about the decision to grade the students on their participation and if so, define the grading criteria clearly; and 6) the decision to include classroom discussion on controversial public issues is supported by the school's administration. Finally, Hess stresses the importance of adequate preparation in order for teachers to successfully guide CPI discussions without predetermining exactly where the discussion will go and calls for more professional development opportunities for both pre-service and in-service teachers to help build such skills (Hess, 2002). Beyond interactions with real artifacts and primary source documents, Museums and Historical Sites can support teachers in building the skills demonstrated by Sparks, Hunt and Twain in delivering high-quality instruction combined with student-led classroom dialogue.

Reisman and Wineburg (2012) offer a model for the inquiry-based and document-centered instruction described above, which they suggest helps students to learn a disciplined approach to historical reading that involves three steps: 1) successfully reading and comprehending written text; 2) the ability to identify and assess conflicting claims or facts; and 3) the confidence and patience to avoid rushing to judgment based on preconceived ideas or

notions (Carretero et al., 2012). In the model pictured below in Figure 1, Document A and Document B represent Step 1 which builds the background knowledge indicated in the center. Steps 2 and 3 happen during the discussion between the teacher and the students focused on the central historical question.

Figure 1

Inquiry-Based Instructional Model

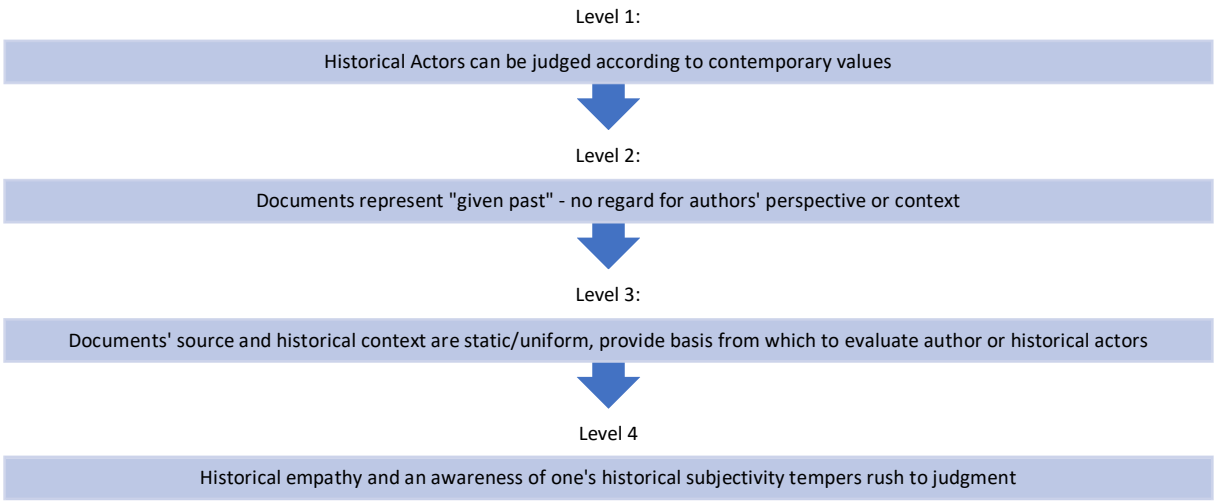
Note. (Carretero et al., (2012).

Using the model, Reisman and Wineburg (2012) conducted a quasi-experimental study comparing 11th grade students who participated in the Reading Like A Historian project versus those who were in a more traditional classroom. Underlying the study was the concept that teachers adept at disciplinary discussion with students should be able to help them progress beyond a "binary" view of history as the past versus the present to a more nuanced view that understands the role of paradox and the fact that in many ways history is "unknowable" in a concrete sense. Their model requires that students objectively see and understand the personal

and subjective view we all bring as we struggle to make meaning of historical events and actors. In this way, students move through four stages of progression as they build their historical thinking skills, as shown in Figure 2.

Figure 2

Historical Thinking Skills



Note. (Carretero et al., (2012).

In order to meet the definition of classroom discussion for the purposes of the study, the teacher had to lead with the historical question, the pre-reading had to include at least two documents, at least three students had to engage in the conversation and the dialogue had to last at least four minutes. They found that out of 100 videotaped lessons, only nine met all four of these defined criteria and these discussions happened in three of the five classrooms involved in the study. Ultimately, the results showed that while many of the students showed progress on reading comprehension and factual knowledge, few made substantive progress on understanding their own "historical subjectivity" (p. 183). In light of the current historical debates happening across the country and the prevalence of presentism, the study provides a glimpse into the difficulty of the task of shifting personal perspectives on history and suggests that perhaps we

should consider encouraging small steps and meeting both educators and students where they are.

Teaching Social Studies Through Museums & Historic Sites

As with the evolution of the NPS, the establishment of public education has also been inextricably linked with the creation of museums since the end of the nineteenth century. A movement to capture the history of the country and to reinforce the dominant narrative took place across the United States and included the establishment of the Smithsonian Institution which was developed by James Smithson for the "increase and diffusion of knowledge among men" (Marcus et al., 2017, p. 27). During the 20th century, the museum movement exploded with the American Association of Museums reporting that a new museum opened every five days during the 1950s and approximately every three days between 1960 and 1963 (Marcus et al., 2017). In more recent years, museums have worked to become more interactive and inclusive, but teachers must still recognize that they present curated and somewhat subjective interpretations of past events.

Currently, the trend in history and social studies classrooms is toward the development of historical thinking and inquiry skills in students using constructivist instructional practices. In fact, the C3 model (College, Career and Civic Life) adopted by the National Council for the Social Studies in 2013 places inquiry at the center for all learning in social studies classrooms. In their book, Inquiry-Based Practice in Social Studies Education, the creators of the C3 model point to the importance of the "inquiry-arc" at the heart of the model and define its four components 1) the development of questions and planning inquiries 2) applying disciplinary tools and concepts 3) using evidence and evaluating sources and 4) drawing conclusions and taking informed action (Grant, et al.,2017, p.3). At the core of their inquiry design model are

questions, tasks and sources. They also discuss some of the current barriers preventing inquiry-based practice to become more widespread. The first is confusion with the concept of "discovery learning" where students essentially decide "what, how, when and why to learn things" which, according to the authors, has been discredited as a practice (p.2). The second is the misconception that traditional pedagogical approaches are more effective in preparing students to perform well on standardized tests. The third, and the one that museums and historic sites, may be uniquely positioned to help address with teachers have limited opportunities to experience inquiry-based practice for themselves.

Marcus and his colleagues build on this idea by arguing that museums and historic sites, in particular, offer a unique setting for authentic and inquiry-based learning to occur. They define authentic learning according to a 1999 study by Shaffer and Resnick as that which is: 1) meaningful to the student; 2) has relevance to the "real world" beyond the classroom; and 3) "provides an opportunity to think in the modes of a particular discipline" (Marcus et al., 2017) When visiting museums and historic sites both teachers and students have the opportunity to explore history through the lenses of disciplinary experts including historians, curators, archaeologists, anthropologists and other members of the staff. In addition, historic sites, in particular, have the ability to demonstrate the importance of geography in relation to history. In fact, Marcus and his colleagues define eight different types of museum experiences, each with its own unique benefits for studying history and social studies. These are: artifact and display-based museums like the United States Holocaust Memorial Museum, local history museums such as the Minnesota History Center, historic forts like Fort Ticonderoga in New York, historic house museums like the Mark Twain House, Living History Museums such as Colonial Williamsburg, the Jamestown Settlement and Yorktown, memorials and monuments like the 9/11 memorial in

New York City, art museums and virtual museums. Interestingly, the Alamo project includes several of these including a historic fort, an artifact and display-based exhibition hall and collections building, a 100,000 square-foot interactive visitor center and museum, a memorial and monument to the people who lived and died at the site throughout its 300-year history and a living history museum.

Researchers suggest three specific ways that museums and historic sites can play a critical role in helping k-12 students to understand our collective history more deeply. The first is through the development of historical empathy by discussing and contemplating the experiences and decisions made by specific people from the past. Such empathy for historical actors is believed to help cultivate more "humanistic" behaviors and attitudes and, therefore, more capable and confident participants in a democratic society (Marcus et al., 2017). Second, museums can help students to adopt a more critical lens when examining the history that is presented. Specifically, through the analysis of artifacts and text, they come to understand that history is a story developed using evidence and expressed by experts through a specific lens or framework. Finally, museums can help students to connect the past with the present and to understand individual events within a larger context. Some historic sites, for example, use living history to interpret the past while others encourage visitors and students to examine and discuss the ways that historically marginalized groups may have been left out of the narrative or the dialogue in the past. Such interactions and experiences can help support teachers in exploring related concepts and ideas in the classroom. In summary, Marcus suggests that "museums are ideal places for engaging students in thinking about how our ideas about the past are generated, mediated and presented and how the exhibits that tell us 'where we came from' are often as carefully constructed as the institutions that house them" (Marcus et al., 2017). The question is

whether or not history and social studies teachers clearly understand exactly how to effectively engage with museums and historic sites as they strive to adopt a more discursive and inquiry-based approach to instruction. In addition, do the staff members at museums and historic sites responsible for designing experiential learning opportunities for teachers of social studies understand the components of effective professional development? Further, if museum professionals understood these principles more deeply and actively utilized them in designing experiential learning opportunities for teachers and if teachers knew how to engage with museums and historic sites more effectively, what would be the impact for students?

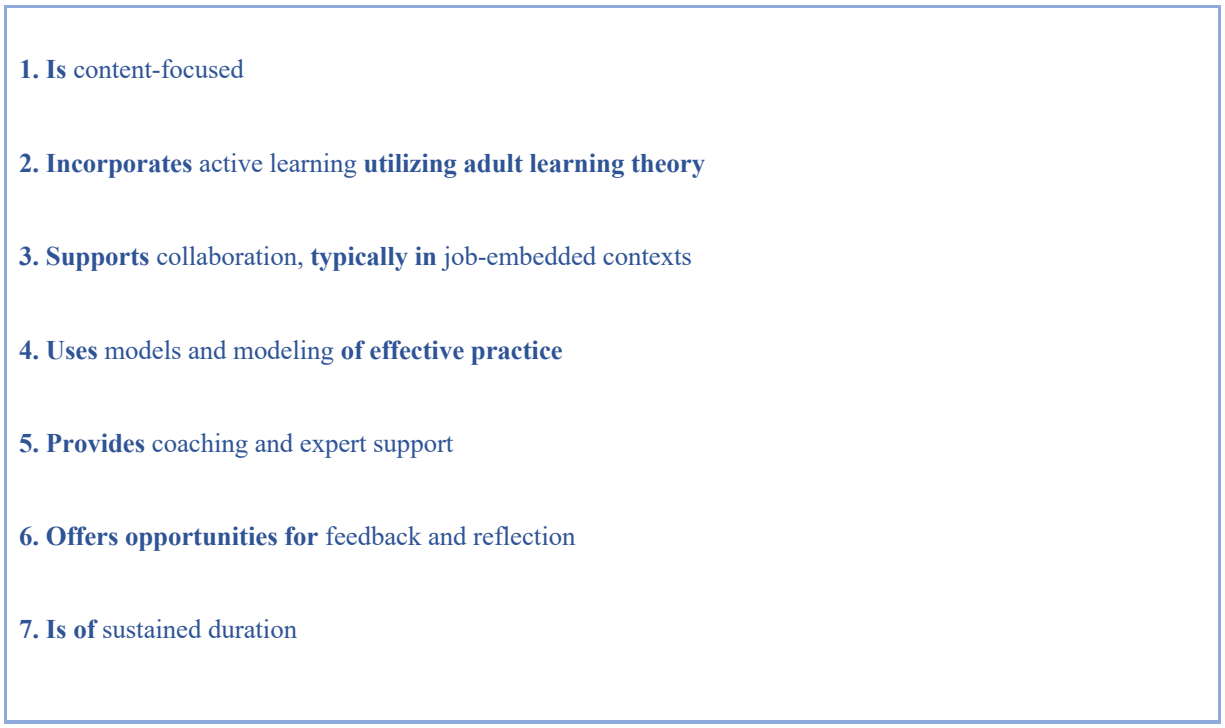
Working with Teachers to Deepen Student Learning

Effective Professional Development Defined

Many studies over the years have shown that a significant number of teachers indicate that most PD experiences simply reinforce what they are already doing versus supporting them in changing or transforming classroom practice (Hill, 2009). The literature suggests that instead of offering traditional, passive lectures and tours, museums and historic sites have an opportunity to create programming that is more active and content-focused, two of the core components of effective PD identified by Linda Darling-Hammond and her colleagues at the Learning Policy Institute at Stanford University. In 2017, they published a meta-analysis of 35 different studies looking at the elements of effective professional development for teachers. In their report, they identify a total of seven characteristics associated with effective PD (Darling-Hammond et. al., 2017):

Figure 3

Characteristics of Effective Professional Development



Note, (Darling-Hammond et. al., 2017).

The opportunity for museums and historic sites is to work collaboratively with educators to design experiences around these seven principles which would extend far beyond the traditional field trip.

Beyond the Field Trip

While Marcus et al. (2012), Hess (2002) and other researchers offer a promising glimpse of what is possible in terms of discursive instruction, student field trips remain the most heavily utilized activity provided by museums and historic sites for the vast majority of teachers (Marcus et. al., 2012) (Hess, 2002). But field trips do not have to be an unguided, one-day experience that exists in isolation from what is happening in the classroom. Instead, there are multiple opportunities and methods to deepen the learning for students (Noel & Colopy, 2006). Beyond working together on trip logistics, researchers suggest that there is an opportunity for greater

collaboration between Museum educators and classroom teachers on the co-development of programming, curriculum materials and experiences for students (Marcus et al., 2012).

By working in partnership with museum educators, teachers can be more thoughtful and planful about pre-visit learning and activities as well as the type of inquiry-based discussion that can be conducted in the classroom after a visit. Additionally, teachers have expressed a desire for Museum staff to offer professional development opportunities for both pre-service and in-service teachers to learn how to effectively leverage a field trip in order to maximize student learning (Marcus et al., 2012). For example, through a partnership with local educator preparation programs, museums could offer pre-service history teachers the opportunity to serve as apprentices and work with faculty on the co-development of resources to prepare future educators to teach using inquiry, discussion and the inclusion of community resources (Pershey & Arias, 2000). By working together, museums can assist teachers as they work to hone their craft and then pass those tools and skills on to their students who will, in turn, become informed museum visitors themselves, a skill they can carry well into adulthood (Wright-Maley et al., 2013).

Why Should Teachers Engage?

With limited time and resources to invest, why should teachers choose to work with museums and historic sites more closely? What is the benefit to them? Using a survey of 51 museum professionals representing 43 history-based museums and interviews with 10 of the respondents, Marcus and his colleagues created a sample dialogue for both teachers and museum staff to use to open a conversation. The researchers propose three distinct reasons for teachers to engage more deeply with museum professionals: 1) museums are places where students can practice the tools of history as a discipline 2) they offer experiences for lifelong learning and 3)

they also offer both formal and informal experiential learning opportunities for students. In the dialogue developed from the survey and excerpts from their interviews, the researchers explore how teachers can enlist museum workers as partners to help address issues around cost and time, alternatives to in-person visits and opportunities for collaboration. Specifically, teachers are encouraged to inquire about opportunities to personalize the experience for their students and to weave the experience more closely with the classroom curriculum. By sharing their learning goals, student characteristics and needs as well as current lesson plans, museum staff and teachers can work together to increase the relevancy of the visit. In addition, museum staff can develop a greater understanding of what resources are most beneficial to teachers (Wright-Maley et al., 2013).

In a study conducted at Thomas Jefferson's Monticello, researchers sought to better understand what it is that teachers actually gain from professional development offered at historic sites (Baron et al., 2019). Through a three-year project funded by the Institute of Museum and Library Services, Baron and her colleagues found that both funding and research has tended to focus more on art and science museums rather than history museums and that many teacher education programs currently being offered are didactic in nature. Using Q-methodology, defined as the "systematic and rigorous quantitative study of subjectivity," Baron et al. (2019) designed a concourse focused on four key areas: "content knowledge, historical thinking and analysis, pedagogical content knowledge and professional dispositions" (Baron et al., 2019). They describe historic sites as "complex constructions of the historical past, preservation initiatives, collective memory, multiple and mixed media spaces and interpretive layers that both reveal and conceal during a visitor's embodied experience" (Baron et al., 2019). The concourse used in the study was first reviewed by experts in the field and teachers were able to respond to

the statements in the concourse a total of three times. Participants focused on the benefits of learning from historical experts as well as each other and the opportunity to delve more deeply into content that they could take back to their students.

In some ways the experience for teachers at Monticello mirrors the concept of reenactment described by English philosopher R. G. Collinwood in his book, *The Idea of History* (Collinwood, 1946). Collinwood's definition of reenactment does not include a dramatic interpretation, but rather the idea that the student or teacher actually journeys back in time to understand what might have been in the minds of decision-makers. In this way the learner seeks to understand not only what happened, but why it happened. According to Collinwood, "a reenactment attempts to recreate and relive the sequence of events of a significant historical happening" (Collinwood, p. 221). By delving deeply into a specific situation or event in conjunction with peer discussion, Collingwood's approach builds on the Socratic tradition and the work of Paulo Freiere who also stressed the importance of dialogue. "Only dialogue, which requires critical thinking, is also capable of generating critical thinking. Without dialogue there is not communication and without communication there can be no true education" (Freire, pp. 73-74). Through programs ranging from one-day workshops to weekend sessions during the school year in addition to summer intensives and fellowships, museums and historic sites have an opportunity to provide programs like those at Monticello for educators to experience what they are learning. Frequently, lesson plans and ideas created through such experiences are shared publicly for other teachers to utilize (Grenier, 2010), expanding the learning beyond just those teachers who attend a particular program.

In their book, *Teaching History with Museums*, Marcus and his colleagues outline 10 best practices for aligning the field trip experience with what happens in the classroom. In addition to

collaborating with museum staff to plan the visit, they suggest visiting the museum or historic sites prior to bringing students (Marcus et al., 2017). They also stress the importance of defining explicit goals for the visit, encouraging students to take a critical stance to what they observe, engaging in both pre and post activities and conducting as much research as possible. It is critical that the visit is clearly linked to the curriculum and what the students are learning. During the visit itself, they emphasize balancing structure with the need for student choice and setting the expectation that such visits are for scholars, not for taking a day off from school. Adhering to these 10 guidelines can help teachers in justifying field trips with key administrators.

Impact on Classroom Practice

When teachers do engage with museums more fully and particularly when they participate in experiential learning opportunities, how does that impact what actually happens in the classroom on a daily basis? The following two studies sought to answer this question. The first, an interpretive case study conducted at the Mystic Seaport Museum in Connecticut looked at the results for teachers selected to participate in a week-long summer intensive (Grenier, 2010). Through surveys, observations and interviews, Grenier was able to analyze the impact that the experience had on the teachers' professional practice. Through the Museum Implemented Professional Development (MIPD) opportunity, teachers built a community of practice together as they explored the role of American Immigration and the Maritime Heritage of African Americans at the site. The 20 participants each brought with them a variety of personal and professional motivations for wanting to attend the Institute and all suggested that the experiential aspect of learning in a museum setting was a key factor. One teacher commented after that "due to my experiences, I have attempted to read more books and articles on different cultures to enhance my classroom teaching" (Grenier, 2010, p. 508). Another stated that "Before I attended

the workshop, I tended to teach mostly only from one point of view. Now, I find myself being able to present many different points of views on issues" (Grenier, 2010, p. 508). In particular, those that participated in the workshop focused on the role of African Americans in maritime history commented on how much it deepened their knowledge of and understanding of the struggles of African Americans in the local community as they fought for equal rights. Others found ways to incorporate people and characters they learned about into their lessons in the classroom to help make history real for their students. One even went so far as to state that she felt the experience "changed her own character." This small study can suggest that MIPD is an area that warrants further study in terms of the potential impact on teachers and their classroom practice.

Building on the notion that effective professional development for educators is inquiry-based, collaborative, content-focused, embedded and interactive, Christine Baron conducted a quantitative analysis of the impact on historical thinking skills in teachers of a specific PD experience to understand its effectiveness (Baron, 2013). Baron followed 15 public and private history teachers through pre and post auditory "think alouds" at two sites in Boston - the Old South Meeting House (OSMH) and the Old North Church (ONC). She first walked the sites with a group of historians in order to define historical thinking skills more concretely into five distinct elements:

1) Origination - how did this building or site come to be?
2) Intersectonality - how does it compare to other buildings or sites?
3) Stratification - what are the multiple time periods or layers of history represented here?
4) Supposition - given what I know and understand, what is the reason for this place or outcome?

5) Empathetic insight - how would the people who once occupied this space respond to it intellectually, socially and emotionally?

The teachers were divided into three groups, each with a slightly different PD experience. Each group toured the OSMH first, then engaged in either a two-day, three-day or five-day learning experience incorporating three modules and then toured the ONC utilizing what they had learned. The participants recorded their observations and reactions using handheld, digital voice recorders and Baron coded the transcripts using quantitative discourse analysis. After each of the tours, participants wrote lesson plans for their students which were then analyzed against a defined set of criteria based on the historical thinking construct. Baron found a statistically significant increase in the number of "historic utterances" from the first tour to the second with the major difference being the level or curiosity expressed between the two experiences. In addition, analysis of the lesson plans showed "greater complexity of thought, increased use of primary sources and integration of site materials into classroom activities" following the PD experience (p. 30). Thus, the lesson plans provided evidence of change in professional practice.

The theoretical frameworks described below help to explain the rationale for providing teachers with the opportunity to experience the many levels of historical thinking first as a learner, before they attempt to build the same skills in students.

Theoretical Framework

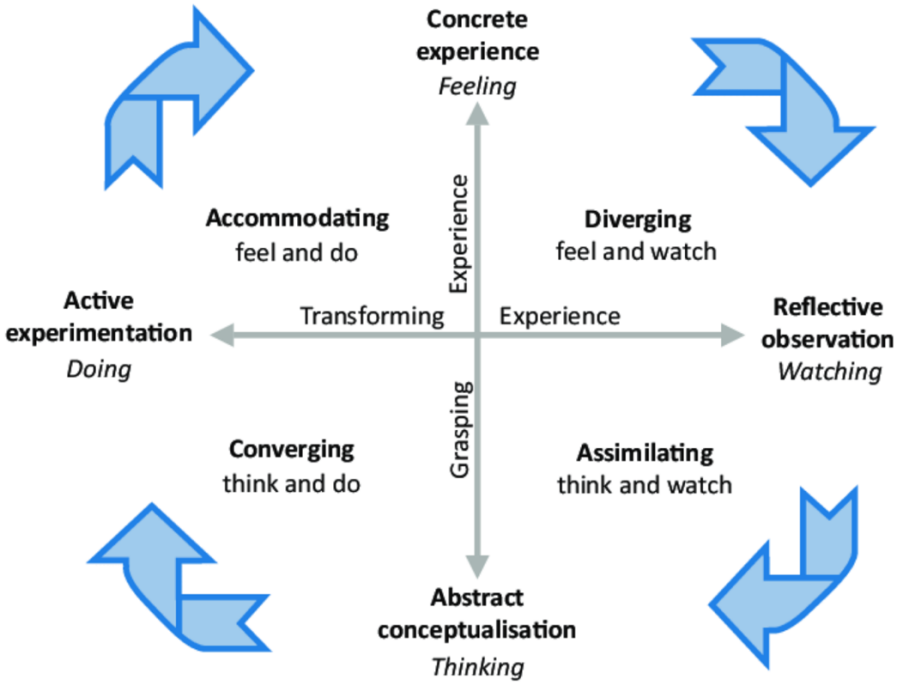
Kolb's Experiential Learning Theory

Kolb's Theory builds on the ideas first introduced by John Dewey and the importance of experience in the learning process. It focuses on the key concepts of experience and reflection, but also includes abstract conceptualization and experimentation. Since Kolb's (1974) theory was first published in the 1970s, it has been utilized heavily in both adult education and career

and technical education as well as in both organizational development and leadership development. Kolb defined learning as "a process whereby knowledge is created through the transformation of experience" (Kolb, 1974). At the core of his model is the idea that the learning cycle can best be described as the process by which "experience is translated into concepts, which in turn are used as guides in the choice of new experiences" (Kolb, 1974, p. 21). In many ways, Kolb was building on the ideas first introduced by Dewey who argued for a more natural and organic form of schooling based largely on experience versus text and memorization. Both promote a constructivist and continuous approach to learning driven by "experiences that engage the whole person and stimulate engagement and interaction among learners, learners and teachers and learners and the environment" (Beard, 2018, p. 28). Kolb used the work of psychologist Kurt Lewin as the logic for the model pictured in Figure 3 below. In the model, Kolb makes the case that effective engagement of the learner begins with concrete experiences that involve the person completely and openly, without bias. Next, the learner must have the space to reflect on his or her experiences and observe them from different perspectives. Third, they must demonstrate the ability to incorporate their observations into concepts and theories based on sound logic. And finally, they must be able to apply the theories that are conceptualized to drive actions and decisions and to solve problems. This is represented in the "doing" phase depicted below. In Kolb's model, the process begins at the top and is both circular and continuous, happening along a continuum of learning and processing based on experience.

Figure 4

Kolb's Experiential Learning Theory



Note. (Kolb, 1974).

Critics of Kolb's work and his book, *Experiential Learning Experience as a Source of Learning and Development* in 1974, point to the lack of attention paid to culture, personal perception and bias in the original design as well as the lack of clarity around the specific types of experiences to be included. For example, Dewey delineated clearly between primary – interaction with the social and physical environment – and secondary – reflective – experiences (Dewey, 1938). For Dewey, only those experiences that exist outside of the routine or ordinary could promote reflection and the assimilation of new knowledge (Miettinen, 2002). Still, there is no doubt that Kolb's model is one that endures and has informed a great deal of additional scholarship on experiential learning which even today is layered with complexity related to its epistemological and ontological meaning, the lenses through which it can be understood and its many definitions. Broadly, the current conception includes those experiences outside of the

ordinary that evoke curiosity and discovery, promote reflection and that engage the whole person.

For the purposes of this study, the idea is that teachers must first experience discursive and inquiry-based social studies and history instruction for themselves as a learner before they can effectively incorporate it into their classroom practice. Museums and historic sites have the opportunity to design professional development opportunities that utilize real artifacts and primary source documents as well as other place-based strategies that enable educators to move through the steps outlined in Kolb's model themselves so they, in turn, can provide safe spaces for students to do the same. Practically, this means that workshops and other experiences should allow ample time for personal reflection as well as group discussion with a focus on facilitating and guiding the learning process while setting boundaries and supporting learners (Beard, 2018).

Andragogy - Adult Learning

To state the obvious, teachers are adults. Therefore, in order to successfully create and implement high-quality experiential learning opportunities for educators, museum staff must first deepen their own understanding and knowledge of the pillars of andragogy (adult learning) and the principles of effective PD. First introduced by Malcolm Shepherd Knowles in 1985, andragogy refers to the art and science of adult learning (Taylor & Kroth, 2009). The Greek origin of the word andragogy refers to "man-leading" or adult-leading versus pedagogy which refers to "child-leading." According to Merriam & Webster, pedagogy refers to the art, science or profession of teaching children while andragogy, as outlined by Knowles, means the art or science of teaching adults (Merriam, 2001, p. 5). Figure 4 summarizes the key differences between the two terms.

Table 1

A Comparison of Andragogy and Pedagogy

	ANDRAGOGY	**PEDAGOGY**
Age	Adults	Children
Learning/Instruction	Self-directed	Driven by teacher choice
Content	Strong focus on individual learner goals	Focus primarily on system goals
Motivation	Primarily intrinsic	Primarily extrinsic
Life Experiences	Many life experiences to build upon	Fewer life experiences to build upon

Note, (Merriam, 2001).

Knowles identified six key pillars of andragogy:

1. Need to Know – adults need to know the "why" behind what they are learning; what is the reason for learning this piece of knowledge or skill?
2. Experience – because adults have experience from which to draw upon which can make the learning richer, educators should leverage this experience and bring it into the discussion.
3. Self-concept – adult learners thrive on self-direction rather than being told what to do.

4. Readiness – learning is best when it can help solve an immediate problem or need in the real world.

5. Problem orientation – adults want to learn specific knowledge and skills to help solve real problems versus generic content.

6. Intrinsic motivation – adult learners are more likely to be motivated by internal or intrinsic factors rather than external or extrinsic factors.

Critics of Knowles have argued that these assumptions do not form the basis for a true theory but rather a model or conceptual framework for understanding what makes adult learners different (Taylor & Kroth, 2009). Still, the pillars are widely used in both the public and private sectors in the creation of educational development programs for adults and for the purposes of this study provide a lens for understanding the principles underpinning the design and delivery of professional development opportunities for teachers at museums and historic sites. Because teachers are adults with rich and diverse experiences to bring to bear on their learning, andragogy should be considered when designing high-quality experiential learning opportunities for them as an audience.

Figure 5 is designed to show how Kolb's Theory of Experiential Learning and Knowles' Framework for Andragogy relate to one another:

Table 2

Relationship between Kolb and Knowles

Kolb's Theory of Experiential Learning	**Knowles' Theory of Andragogy**
Creation of concrete & engaging experiences	Intrinsic Motivation & Need to Know
Reflection	Experience & self-concept
Abstract conceptualization	Readiness to Learn
Active experimentation	Problem orientation

By creating meaningful authentic learning experiences and clearly articulating the learning objectives and desired outcomes, professionals at museums and historic sites can increase the intrinsic value for teachers who decide to participate. In addition, when such experiences allow ample time for discussion, practice and reflection, they can draw on the unique experiences and perspectives of the teachers and help to build community with peers. To the extent that participants can consider how the concepts apply to real challenges they are facing in their classrooms, transferability can be enhanced. And finally, by focusing on actual challenges, teachers are encouraged to apply the concepts and theories to their professional practice.

In summary, this study seeks to understand the extent to which the principles of experiential learning for adults are utilized in the design and delivery of learning opportunities for teachers at museums and historic sites.

Conclusion

The literature demonstrates a long and intertwined relationship between the evolution of historic sites and museums and social studies instruction in the United States. It also suggests that historic sites, in particular, are uniquely situated to offer authentic experiential learning opportunities for teachers of history and social studies. However, there is currently a gap between the discursive, inquiry-based instructional practice desired in social studies classrooms and its utilization by teachers. Teachers need assistance in building both their confidence and skill in delivering such instruction and managing conversations with students. In addition, in order for teacher educators at museums and historic sites to deliver meaningful learning opportunities for teachers, they also need to deepen their understanding of effective professional development experiences.

While there have been some studies conducted in recent years regarding the role of museums and historic sites in working with classroom teachers, there is still a great deal that is unknown. By working as true partners in the design and implementation process, teachers and museum professionals have an opportunity to build experiences and tools for teachers of history and social studies that do not currently exist. Historic sites, in particular, can offer the opportunity to learn from curators and historians who regularly have to figure out how to incorporate new evidence into their present interpretations of the past. Such sites also offer the power of place and the chance to create memorable and defining experiences for teachers. This study aims to build upon the research to date by delving into the learning principles that drive programming decisions at well-known sites and museums in order to assist others who strive to emulate and build upon their work.

CHAPTER THREE: METHODOLOGY

This study was designed to help define the role of experiential learning and andragogy in the development and delivery of professional development opportunities for k-12 social studies educators at historic sites and museums. The findings have implications for the museum staff members responsible for designing and delivering workshops and teacher training sessions as well as current and future participants who may benefit from such opportunities. The goal was to help clarify those principles critical to replicating high-quality experiential learning at other, similar organizations such as the Alamo located in San Antonio, Texas, and other sites around the country. In addition, opportunities for improvement were also identified so that the professional development experiences offered for teachers of history and social studies can have a truly transformative effect on classroom practice.

Through a series of one-on-one interviews with museum professionals, informal observations as well as interviews and focus groups with participating teachers, the study examined the concepts and principles that drive the creation of experiential learning opportunities for teachers of social studies and history at a total of four well-known sites across the country. The sites were selected based on their reputations for offering high-quality continuing education opportunities for teachers. The premise was that teachers must first experience a more discursive and inquiry-based approach to instruction as learners before they can implement such practices in their own classrooms. The goal was to distill the foundational learning pillars driving the development of innovative professional development opportunities for teachers in order to assist other museum professionals in creating similar experiences using a place-based and immersive approach. Specifically, the findings and recommendations are intended to help inform the implementation of the $300 million Alamo redevelopment plan

currently underway in San Antonio, Texas. As part of the plan, the staff at the Alamo aims to create a world-class experience for the more than 1.6 million people who visit the site each year through the construction of a new 100,000 square-foot Visitor Center and Museum. The plan also includes the creation of an education center on the site and the development of learning opportunities for k-12 educators across the state that specifically meet the needs of social studies and history teachers and ultimately translate into better outcomes for students. As such, there were two research questions guiding this study:

1) What principles and goals underpin the design and delivery of experiential learning for K-12 teachers at key U.S. historic sites and museums?
2) How do teachers experience, internalize and act on these educational opportunities?

Study Overview

Using a qualitative design, this study was rooted in the premise that in order to successfully create and implement effective professional development opportunities for teachers, the staff at museums and historic sites must first deepen their own understanding and knowledge of the principles underlying Kolb's Experiential Learning Theory and Malcolm Knowles' Theory of Andragogy (described in Chapter 2) as well as the principles of effective PD identified by Linda Darling-Hammond of Stanford University and her colleagues in their 2017 study (Darling-Hammond et al., 2017). The study explored the utilization of these principles at four national historic sites and museums.

Population and Sample

Through purposeful or judgmental sampling, the focus was on sites that already offer a robust and established array of professional development opportunities for teachers. Based on a review of the literature as well as network sampling, the following sites were identified:

Gettysburg National Military Park, the National WWII Museum in New Orleans, Jefferson's Monticello and George Washington's Mount Vernon. The criteria for selection included:

1) Each site has a history of providing professional development opportunities for teachers for at least five years or more

2) The success of their programs is demonstrated by the fact that there is a waiting list for participation and/or a rigorous selection process for participants

3) They were each recommended by a fellow professional at a museum or historic site for offering innovative or unique programs for teachers

Because this was not intended to be a quantitative study, random selection was not the focus, nor was generalizing the results to a broader population such as all teachers of history and social studies in Texas. Instead, the goal was to offer a deeper, more nuanced understanding of those who design and deliver HSBPD and how it benefits the teachers who participate, which could have implications for other museums and historic sites seeking to either expand or improve their own programming. A preliminary review of the information available on the websites of the four institutions suggested that they all have robust programming offered to both teachers and students constituting a rich and diverse environment for study. These institutions were also selected based on their similarities to the Alamo in terms of their historical significance and potential to cover controversial topics in today's highly polarized environment. Through a series of informal observations, interviews and focus groups, I explored how they engage with local educators in the development of programming, the challenges they face and the ways that they measure the impact of their work on classroom practice. In addition, I sought their consent to conduct interviews and focus groups with participating teachers in order to understand their perspective of the value of professional development provided by historic sites and museums.

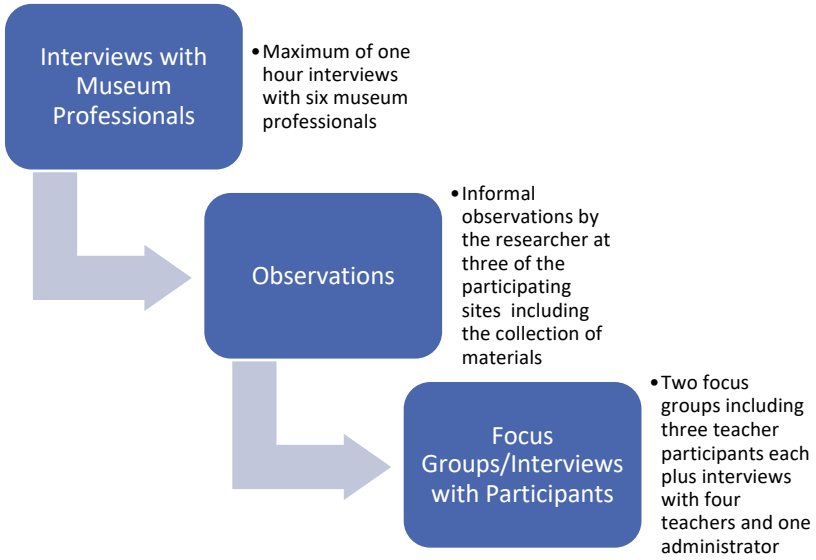
Each of the site leaders as well as the educational leaders were contacted via e-mail with follow up calls made to secure their participation in one-on-one interviews. Contact information for each person was provided by the museum design firm who worked on the exhibits and visitor experience at two of the locations and through a professional acquaintance who serves on the Board of the National Parks Service. Invitations were sent to a total of five sites, but one, the U.S. Holocaust Museum in Washington, D. C., declined to participate as they were in the midst of a strategic planning process in the summer of 2022 and not offering in-person experiences for educators.

Instrumentation

As shown in Figure 5, data for the study were collected through a three-step process conducted while on-site at each of the four locations during a professional development session or workshop for k-12 educators in the summer of 2022. Interviews with museum professionals were conducted before each session at Gettysburg, Mount Vernon and Monticello. They were conducted during the weeklong seminar at the National WWII Museum. In addition, interviews with two former teacher participants and one administrator from Gettysburg were conducted via Zoom and two participating teachers from the National WWII Museum were interviewed instead of participating in a focus group due to time constraints.

Figure 5

Research Methodology



Step 1 – Interviews with Museum Professionals: This study employed a three-tiered sampling approach (Merriam & Tisdell, 2016) including 1) the selection of the sites themselves where the informal observations occurred 2) individual interviews with selected museum leaders and 3) focus groups and/or interviews with participating teachers. The interview sample included a total of six people, two from Monticello and the National WWII Museum and one from Mount Vernon and Gettysburg. This sample included both the top educational leader as well as the person responsible for designing and deploying teacher professional development at each of the bounded, case study sites listed above.

Instrumentation for Step 1 Sample: Using one standardized and open-ended protocol for both the education and program leaders, 90-minute interviews (Patton, 2002) were conducted to understand the educational philosophy of the organization and the decisions driving the content, the design, and the desired learning outcomes for HSBPD within their individual

contexts. The reason for using the same protocol was to understand the similarities and differences between their perspectives on professional development at their respective organizations based on their individual roles. The protocol was tested with two local museum leaders and the members of their education teams prior to being used in the field. Following Institutional Review Board approval, these interviews took place in the Summer of 2022. These interviews were conducted either virtually or in-person prior to participation in and observation of a professional development experience at each site.

Key questions explored with the organizational and education leaders focused on Kolb's Experiential Learning Theory and Knowles' Theory of Andragogy including: How do they go about recruiting participants?; What barriers and challenges do they face, especially in the midst of a global pandemic?; What is the benefit to teachers of participating in HSBPD?; What are the primary learning objectives for the PD experiences that they offer?; What types of problems of practice do they focus on solving?; What instructional strategies do they use?; How do they measure the value for teachers?; What do they do if anything to develop and support a learning community over the long term?; And how do they assess and support transference into the classroom? (see Appendix A)

Steps 2 & 3 – Observations & Focus Groups/Interviews with Teacher Participants: The goal was to attend at least one multi-day workshop and/or a portion of a one-week intensive at each of the selected sites in the late Summer of 2022 to conduct informal observations to aid in assessing overall teacher reaction and engagement and, more importantly, to inform the discussion guide and questions for teacher interviews and focus groups at each site. Because Gettysburg was not hosting in-person sessions during the time of this study, interviews with the education leader plus two teachers and one administrator who attended sessions in the past were

interviewed via Zoom. Where possible, the observations helped in the selection of a diverse group of teachers to participate in the interviews or focus groups which were held toward the end of the workshop or intensive. At Mount Vernon and Monticello, one 60-minute focus group with three social studies and/or history teacher participants was conducted using a semi-structured interview guide (Patton, 2002). At the National WWII Museum, 60-minute interviews were conducted with two teachers using the same question protocol. Therefore, the second sample was comprised of 11 teachers who agreed to participate – six in focus groups and five through individual interviews. The reason for capping each focus group was to ensure a rich and inclusive dialogue in the time allotted.

Instrumentation for Step 3 – Focus Group/Interview Sample: A consistent protocol with eight standardized questions served as the foundation for the focus groups and teacher interviews in order to ensure comparability across the sites (See Appendix B). Each question included approximately four to five minutes of discussion, one minute per participant, absorbing the first 30-minutes of the 60-minute conversation. The protocol was tested with members of the Alamo's Educator Advisory Panel before being used in the field. In addition, informal observation throughout the workshop or intensive was used to inform the remaining two to three focus group questions, enabling additional probing and further contextualization of specific topics that surfaced during the experience. For this reason, the focus groups were scheduled toward the end of the week-long sessions. During informal observations of the learning taking place, special attention was paid to the elements of andragogy as well as effective professional development described by Linda Darling-Hammond and her colleagues in their 2017 study (Darling-Hammond et al., 2017).

In order to be selected for the focus groups or interviews, participants had to be teachers of history and/or social studies. Through the informal observations, teachers were invited to participate based on a range of characteristics including race, gender, age, tenure, geographic location, and grade level. The two focus groups and five interviews served as the primary basis for understanding what the teachers *felt* they gained through their participation including their thoughts, values, motivations, and attitudes, all internal views that are not easily observed (Patton, 2002). Each of the eight standardized questions focused on one of the elements of effective PD defined above and the final two to three questions focused on their intention to transfer the learning to their classrooms and their confidence in their ability to do so successfully. What challenges and barriers might they face? The goal was to include a rich variety of professional history and social studies educators based on the factors outlined above. Therefore, recruitment of focus group and interview participants at each site was intentional and followed the same process for gaining permission as outlined for the museum professionals including informed consent.

From the six interviews with museum educators and professionals at each of the sites as well as the two focus groups and five interviews with teacher participants, this study was designed to look at the use of andragogy in the design and implementation of experiential learning opportunities for teachers at historic sites and museums as well as teacher perceptions about the effectiveness of such experiences based on the seven principles identified by Linda Darling-Hammond and her colleagues.

Data Collection

As outlined by Lochmiller and Lester (2017), the researcher must consider legal as well as moral responsibilities when designing a study. In the United States, the standards provided by

the American Educational Research Association (AERA) provide a framework to guide both quantitative and qualitative studies such as the one I conducted (National Research Council, 2002). First, participants were briefed about the parameters and goals of the study and asked to participate. They offered their consent either verbally or in writing in order for any results to be shared. This is known as informed consent (Glesne, 2011). For the purposes of my study, because I was looking at the educational programming and practices of other historic sites around the country, I focused on adult participants, primarily in the executive and education departments of the institutions that agreed to participate. I did not engage participants under the age of 18, and therefore, assent by a parent or guardian was not a consideration. Participants also had the right to withdraw from the study at any time without penalty if it became a burden or if they developed concerns over the direction or content.

As described by Rubin and Rubin (2012), the role of the researcher as a "conversational partner" should be based on the principle of respect for people and their wellbeing. The idea is to minimize risk and to protect confidentiality. Because participation should always be completely voluntary based on a thorough description of the study and its intent, incentives were not utilized to try to coerce people into cooperating. Instead, for the institutions and teachers that chose to participate in my study of the role of historic sites in providing training and professional development to social studies teachers, I offered a small token of my appreciation such as a gift card or gift basket once the study was complete.

As mentioned above in the sampling section, I contacted a total of five institutions regarding possible participation including the Gettysburg Visitor Center and Museum in Pennsylvania, the National WWII Museum in New Orleans, the U.S. Holocaust Memorial Museum in Washington, Monticello and Mount Vernon. It was not my intention that the sites

themselves be kept confidential. However, the names of specific individuals who participated in an interview, an observation or focus group were protected. One plausible risk that remains is that someone in the field might be able to identify a museum professional who participated in an interview with a specific response based on their knowledge of the institution and its programmatic offering. Individuals were made aware of this risk before consenting.

The goal was to interview the museum professionals prior to the beginning of the PD experience to be observed so that the conversations could take place in person. With Gettysburg, this was not possible since they were not conducting in-person sessions, therefore, the interview was conducted virtually. Permission to record each 90-minute session using the Otter application was secured in advance in order to assist with transcription. Participants were informed that they could choose not to answer a specific question if they did not feel comfortable.

I took an "observer as participant" approach during the workshops or PD sessions attended at Mount Vernon, Monticello and the National WWII Museum (Merriam & Tisdell, 2016, p.144). This meant that the teachers knew why I was there and the purpose of my study in advance. This allowed me to both participate in the dialogue and the activities as an insider while still not becoming a full-fledged member of the group. I did not record the sessions themselves. Instead, I focusede on taking field notes describing the physical setting, the participants, the activities included in the workshop and interactions and conversations with the staff educators as well as among the teachers. Following the advice of Taylor and Bogdan, the goal was to pay attention to specific individuals within the group and to make note of key phrases and statements that stood out as well as any insights that emerged (Taylor et al., 2015). These were not intended to be formal observations and, therefore, the notes are not included in the final analysis. Rather,

the goal was to utilize the observations to help inform questions and follow up items to be discussed during the focus groups and interviews with teachers.

The two focus groups and five interviews with participating teachers selected at each site were designed to be structured enough to allow for comparison between the various locations. With the exception of Gettysburg, they took place toward the end of each week-long session in order for the teachers to reflect on the value of the PD they just experienced. The exact timing for the conversations had to be flexible based on the programming schedule at each site but they generally took place on Thursday afternoon before the conclusion of the seminar or institute on Friday. These sessions were recorded with permission secured in advance. During the focus groups and interviews, the participants were asked if there were particular artifacts such as documents or educational videos from the sessions that they found particularly useful (Merriam & Tisdell, 2016). I worked with the staff at each site to secure copies of such artifacts so that they too could be analyzed through the researcher's lens based on the pillars of experiential learning and andragogy as well as the seven principles of best practice.

Data Analysis

Transcripts of all interviews and focus groups conducted during visits to participating sites were analyzed for consistent themes and categorized. The transcripts were analyzed using open coding (Merriam & Tisdell, 2016). The coding for the interviews with museum professionals as well as the interviews and focus groups with teacher participants was built on the research questions to be answered. In contrast, the field notes from the observations were not formally coded and were used instead to inform additional questions to be addressed during the focus groups and interviews as well as key themes and ideas.

Collection and analysis of the data took place simultaneously throughout the study. While visiting each location, this process took place daily, transcribing and coding each evening while the information was still fresh. Upon return from each site visit, further analysis in search of patterns and ideas was conducted in order to inform the next trip or visit. Following the advice of Bogdan et al. (2011), analytic questions were developed in advance, observer comments were clearly delineated within the field notes, personal memos were written to capture critical insights, key themes were shared with participants to gather feedback and metaphors were used when possible or appropriate (Merriam & Tisdell, 2016).

Credibility and Trustworthiness

Because the researcher is the primary instrument in a qualitative study such as this one, ethical considerations and potential biases must be considered. This includes everything from confidentiality, informed consent and data storage to the mental health and personal views of the person conducting the research. In addition to sharing emerging themes with participants while in the field, key findings were also reviewed by the six museum professional interviewees as well as the teacher participants who were willing for the purposes of triangulation and validation (Merriam & Tisdell, 2016). This helped to ensure that the findings are indeed accurate and credible.

In order to ensure credibility and reliability, I took three specific steps. First, I clearly articulated the underlying assumptions driving the study. I triangulated the findings with both the education and program leaders at each of the participating sites as well as the teachers engaged in the focus groups and interviews. And finally, I described all of the steps in both the data collection and the analysis in order to create an “audit trail” for future readers (Merriam &

Tisdell, 2016, p. 265). In addition, all of the findings are described using rich and descriptive text which will assist with transferability (Merriam & Tisdell, 2016).

Perhaps the biggest risk to participants in this particular study, especially those who work at the four historic sites and museums, is that anonymity was difficult to achieve. Through a quick google search, a reader could find out the identity of the education director or the program leader at any of the institutions within a matter of minutes. They had to know this and be comfortable with the idea before they consented. The potential benefit was to have their programs and their work with teachers highlighted in the text, but this would only be realized if the teachers had positive things to say about their experience during the PD session or workshop. There was a high probability that this would occur given the criteria for how the sites were selected, but it was still a risk that was identified and clearly communicated. By agreeing to share the themes and findings with the participants before they were published, at least the element of surprise was removed from the communication and/or publication of the findings.

Ethics

My study of the role of historic sites in working with educators is built on a constructivist understanding of the world. I hold two beliefs that may or may not be in alignment with the views of either the institutions participating in the study or actual classroom teachers. The first is that social studies education is critical to the preservation of democracy and the cultivation of civic agency in students. If we do not have a solid understanding of our past, we are more likely to repeat our mistakes. Second, I believe that social studies as a subject is often overlooked in its importance because of our emphasis on standardized testing in other subjects, particularly math and language arts. As a result, the quality and variety of professional learning opportunities offered to teachers of history and social studies may not be as robust. I am open to challenges to

these beliefs and to discovering deeper insights about the needs of practitioners as well as new and innovative ways to meet those needs.

In addition to informed consent and the credibility and trustworthiness of the researcher, the handling and storage of data presents another ethical consideration (Lochmiller & Lester, 2017). I stored the documents created through my interviews, observations and focus groups as well as any artifacts collected such as lesson plans and classroom materials on a secure server with password protection. Review and approval of my proposed multiple case study design by the Institutional Review Board (IRB) at the University of Southern California ensured that I took the necessary steps to protect the rights and welfare of participants.

Role of the Researcher

Perhaps the biggest dilemma for me as a researcher and the actual "instrument" in this qualitative study had to do with my own political views and my current environment. The latest Legislative Session in Texas ended on Friday, May 28th and there were several highly contested bills passed covering everything from voter suppression and concealed carry laws to the reproductive rights of women. The conservative agenda also included two bills that ban educators from teaching Critical Race Theory in their classrooms and prohibited the discussion of slavery. In addition, there was a book released on June 8, 2021 by three Texas journalists entitled *Forget the Alamo*, which made several claims about the "myth" of the famous battle of 1836 and its "heroes," not the least of which was that the primary reason for the Texas Revolution was not freedom and independence as we have been taught, but that the Texas Defenders were fighting for their right to own slaves. Texas is one of only 10 states where members of the State Board or Education, which establishes the curriculum standards known as the Texas Essential Knowledge and Skills (TEKS), are elected in a partisan election (Williams

and Maloyed, 2013). Philosophically, I do not believe it is the role of politicians to determine what professional educators can or should teach in the classroom. Instead, teachers should be afforded the autonomy to make those decisions based on their own expertise as well as the needs of their students.

In addition, as the Executive Director of the Alamo Trust, I technically report to a Board of Directors, but because the Alamo itself is under the control of the Texas General Land Office, the staff there is involved in almost every decision I make, especially those that could have political implications for the Commissioner and his/her staff members who are always on high alert. In addition, the Texas Lt. Governor, Dan Patrick, has a personal passion for the Alamo and its future and he and his team are heavily involved as they secured a $50 million investment from the Legislature in 2021 and are working on another major appropriation for the 2023 session for the Alamo Plan redevelopment project which I have been charged with implementing.

Locally, the politics are quite different and at the opposite end of the spectrum. The Alamo Citizens Advisory Council organized by the City, who technically owns the Plaza directly in front of the iconic Alamo Church, wants to tell the full story of the site including its beginning as a home to indigenous people, the Mission Era, the Revolution and up through the modern-day Civil Rights movement. They do not agree with the state's emphasis on the Battle as the main focus of the future Visitor Center and Museum. Personally, I would love to see the Alamo become a beacon for historical reconciliation and a place that brings people together versus tearing them apart, but politically that may not be possible at this time. For all of these reasons, I had to be very careful with my study and its implications as it could have negative consequences for the $300 million Alamo Plan as well as my job. I prepared myself to conduct a study based on sound research methodology and ethics, while also constantly being vigilant about the

political ramifications. I also had to remain open to the findings and the ways they may challenge my own beliefs and views.

Conclusion

The goal of this study is to help the staff at the Alamo as well as other museums and historic sites across the country to understand how the principles of andragogy and best practice can be utilized to create meaningful experiential learning opportunities for k-12 teachers. Through a series of one-on-one interviews, informal observations and focus groups with participants at four well-known museums and historic sites around the country, the study sought to understand the benefit of professional development experiences for k-12 history and social studies teachers. Based on the qualitative methodology, broad transferability and replicability was not the objective. Rather, by understanding how these concepts are currently being utilized by other museum professionals, the recommendations offer ideas and suggestions for not only how to develop similar programming, but also thoughts for improving upon the current offering in order to maximize the impact of HSBPD on classroom practice. Chapter 4 describes in detail the findings from the interviews and focus groups and offers an analysis of these findings.

CHAPTER FOUR: RESULTS AND FINDINGS

The purpose of this qualitative study was to investigate the impact of experiential professional learning experiences for history and social studies teachers hosted at museums and historic sites around the country. Through a series of interviews and focus groups with both museum professionals as well as teacher participants, the goal was to understand the objectives that drive such learning opportunities and the benefits derived by both practicing educators and the organizations themselves. The research questions that guided the study are:

1. What principles and goals underpin the design and delivery of experiential learning for K-12 teachers at key U.S. historic sites and museums?
2. How do teachers experience, internalize and act on these educational opportunities?

Site and Study Participants

Of the five institutions invited to become part of the study through purposeful sampling, four accepted. The only one to decline was the National Holocaust Memorial Museum in Washington, DC who was in the midst of a strategic planning process in 2022 and not offering in-person summer experiences for educators. Gettysburg was also not conducting an in-person session in 2022, so instead three former participants in their "Days with Documents" workshops were interviewed. Informal observations of week-long sessions that included focus groups and interviews with teachers were conducted at Mount Vernon, the National WWII Museum in New Orleans and Monticello. The specific learning experiences that were either referenced or observed directly included:

1. Gettysburg National Military Park – *Days with Documents* (https://www.nps.gov/gett/learn/education/professional-development.html).

2. National WWII Museum in New Orleans/Summer Teacher Seminar – *Voices from the Pacific War: Teaching the Untold Stories of WWII* (https://www.nationalww2museum.org/students-teachers/educator-resources/professional-development).

3. Thomas Jefferson's Monticello – *Monticello Teacher Institute* (https://www.monticello.org/research-education/for-educators/monticello-teacher-institute).

4. Mount Vernon/George Washington Teacher Institute – *The Great Experiment: George Washington and the Founding of the U.S. Government* (https://www.mountvernon.org/education/for-teachers/teaching-institutes-professional-development).

At Gettysburg and the National WWII Museum, I conducted semi-structured interviews lasting 45 minutes to one hour with a total of four teacher participants and one principal. Transcripts from each conversation were recorded using the Otter app and then transcribed and coded using Max QDA. A table listing all of the participants who engaged in individual interviews is included below:

Table 3

Teacher Interview Participants at a Glance

Pseudonym	*Site*	*State*	*Grade Level*	*Subject*
Cindy	Gettysburg	Pennsylvania	8th Grade	U.S. History
Erin	Gettysburg	Minnesota	8th Grade	U.S. History
Darren	Gettysburg	Maryland	Principal	NA
Christy	WWII Museum	Ohio	9th grade	Modern World History
John	WWII Museum	North Carolina	8th Grade	U.S. History

In addition to the five individual interviews listed above, two focus groups with three teachers each were conducted at Monticello and Mount Vernon for a total of 11 teachers whose voices were included.

Table 4

Focus Group Participants

Pseudonym	*Site*	*State*	*Grade Level*	*Subject*
Joe	Mount Vernon	Mississippi	High School/10th Grade	AP Government & Economics
Peter	Mount Vernon	Kentucky	4th & 5th Grade	Social Studies
Melissa	Mount Vernon	Florida	k-5th Grade	Gifted
Jill	Monticello	Michigan	High School/10th Grade	U.S. History, Government & Economics
Courtney	Monticello	Ohio	8th Grade	American History
Mary	Monticello	Massachusetts	High School/10th, 11th & 12th Grades	AP Psychology, Criminology & New Zealand Studies

In order to capture the voices of the program designers themselves, a total of six professional museum educators were also interviewed including one from Gettysburg and one from Mount Vernon as well as two from the National WWII Museum and two from Monticello. All of the education leaders were interviewed separately with the exception of the two from Monticello who were interviewed together. These conversations also lasted between 45 minutes to one hour and were recorded, transcribed and then coded using the same software.

Each transcript was reviewed and analyzed at least three times using a system of open coding in order to identify consistencies and differences in the experiences of both program participants and program designers. The patterns that emerged were then grouped into thematic categories. Following this analysis, the participants were contacted to provide feedback on the

preliminary findings and to offer suggestions and additional insights. In addition, two other museum experts, one who is the President and CEO of a natural history museum in San Antonio and the other who owns an international museum design firm, were asked to provide their thoughts and reactions.

Findings

Across the focus groups and interviews, three key themes emerged for each research question as described below in Table 3. The professionals at each of the participating sites pointed to the utilization of primary source materials and input from teachers as being core to overall program design and delivery. They also talked about the organizational benefits of having a community of engaged teachers to offer feedback on future programming ideas and the ability to express their deep appreciation for the teaching profession through immersive professional development experiences. Finally, they articulated their goal to share multiple perspectives related to a specific person or historical event and to support teachers by offering language and tools that can be used to manage sometimes contentious conversations in the classroom. For the teacher participants, they referenced the power of learning in the place where history actually happened and being able to bring that experience back to their students. They also discussed their plans to transfer the learning to their colleagues back on their campuses and in their districts. Finally, similar to the organizations themselves, they expressed appreciation for having built a network of like-minded professionals that they could turn to in the future for ideas and support. In some respects, the teacher participants were part of a secret or hidden society unknown to much of the rest of the educational world. Once they participated in one experiential learning opportunity, they were likely to participate in another and then another, clearly seeing a benefit to themselves both personally and professionally. Similarly, professionals at the sites themselves,

many of whom had been delivering such experiences for a decade or more, saw value in the time and resources that are invested. In short, the ability to travel to the actual site where a certain event took place or a person lived helped to make history come to life through interactions with subject matter experts and hands-on activities using real artifacts and primary sources. Each of these themes will be described in more detail with examples from the participants themselves.

Table 5

Emerging Themes

Research Question 1	Theme 1: Constructivist Design Driven by Primary Sources	Theme 2: Creation of Community/ Respect for the Profession	Theme 3: Multiple Perspectives & Critical Conversations
Research Question 2	Theme 1: Power of Place	Theme 2: Sharing the Learning/ Classroom Application	Theme 3: Professional Network & Personal Growth

Research Question 1: What Principles and Goals Underpin the Design and Delivery of Experiential Learning for K-12 Teachers at Key U.S. Historic Sites and Museums?

Through interviews with program leaders and designers at each of the participating sites, it became evident that the weeklong intensive experiences were being built based on feedback from participants and peers with primary source materials at the core. By using real documents and artifacts, each of the institutions introduced the educators to the classroom resources that they provide and demonstrated how to use them with students.

Constructivist Program Design Driven by Primary Sources

The program designers at the various sites did not point to a specific learning theory or framework as guiding the design of their programs and sessions. Instead, input from teachers was a driver along with staff collaboration and analysis. At Gettysburg, the program lead described an experience at the National Holocaust Memorial Museum in Washington, D.C. that changed her thinking about professional development for educators based on experiential learning. At Mount Vernon, one of the education leaders took a year to study what they were doing, to gather feedback from educators and to make recommendations for changes. Based on that, they moved from a standard curriculum for each week to a thematic approach such as the founding of the nation or Mount Vernon and Slavery.

> Our mission is the life, leadership and legacies of George Washington. It's twofold. It's preservation and it's education…and so when I think about our education outcomes, we have three main broad outcomes for the whole experience. The first one is a content-based outcome. And that is how George Washington shaped the world in an age of revolutionary change…so not only was he in a position to change the world, the world itself was in a moment of powerful transition during the Age of Enlightenment. The reason we bring that forward instead of just learning about George Washington is because it activates his leadership…The second outcome is more about an attitude or perspective. We want people to have a memorable and relevant experience so that it stays with them and they can connect the past to today…And then the third outcome is my stretch outcome…and that's a behavior change. It's really thinking about how we can support people when they come to Mount Vernon to become positive contributors to their community…it's the civics outcomes of a visit to our site. What were the choices

> Washington was making in honor of the community that he was a part of? How can you be making choices that honor the community that you're a part of? Teachers are already doing amazing service to their communities and contributing in positive ways just by choosing that profession…it's teaching them to see the work that they do is in-service to the community at large. (Educational Leader, Mount Vernon)

Thus, the institution strives not just to deepen the knowledge that educators have of George Washington and his life but they also intentionally work to create lasting memories and to increase the level of civic engagement of participants.

At the WWII Museum, the program lead was relatively new in her role and was charged with moving away from full weeks dedicated to each of the four curriculum volumes that were created for teachers based on the Museum's four Pavilions to pulling from all of them to create a cohesive experience. Using a color-coding system, she mapped out the sessions based on content lectures, classroom application activities and immersive experiences to ensure that they were creating the right balance. She then sought feedback from her colleagues before launching the new PD series offered in the summer of 2022.

> I tried to be very intentional about balancing the content lectures from our historians that are kind of laying out the scholarship…probably providing a lot more in depth detail than teachers are going to be able to incorporate into their classrooms because of time constraints. But I thought it was important because when I was teaching or when I design education programs, I feel like I need to have a very broad base of content knowledge so I understand how to curate the learning experience for students. I wanted to balance those important content sessions to give them that background knowledge…with both sessions

focused on pedagogy as well as curriculum highlights and experiences. (Museum Educator, National World War II Museum)

As described above, striking a balance between content and classroom application was a consistent theme among the program leaders who were interviewed.

Most museum professionals described their approach to program design as constructivist based on ongoing comments and feedback as well as their own observations about what works and what does not. For many, the learning begins before the teachers even arrive. At Mount Vernon, there were required readings including *George Washington, Nationalist* by Edward L. Larson and *The Only Unavoidable Subject of Regret;" George Washington, Slavery and the Enslaved Community at Mount Vernon* by Mary V. Thompson, a retired historian who spent years at Mount Vernon. Similarly at Monticello, there was a combination of readings such as *Understanding and Teaching American Slavery* by Bethany Jay and Cynthia Lynn Lyerly as well as online resources such as videos. At WWII, a preparatory course was set up in Canvas for the teachers to provide an opportunity for them to get to know each other and begin the cohort-building process through introductory flip grid videos and virtual discussions. A group project was included in the course and both the program leader and the teachers did not feel that it really worked. The teachers simply had too much going on at the end of the school year when the course was first launched and the museum educators decided to abandon the idea mid-stream.

During each of the sessions that were observed, the staff worked to compile a shared folder where all of the presentations and resources that were shared as well as any content developed by the teachers themselves was placed for future reference. Following the sessions, teachers generally felt confident that if they needed help or had a question about a specific topic or lesson that the staff and the experts would be there to support them.

> I love the resource page they're putting together where everything is there. And I feel like if I emailed any of them and said, you know, where was this or what about this? I feel like they would respond and they would assist. So that builds confidence because you know, if you run into some issues, somebody there is gonna help you. (Mount Vernon Focus Group)

Through the development of such resources, the teachers felt that the organizations were offering at least some level of ongoing support and that if additional help was needed, they could reach out to the program organizers for assistance.

At all of the sites included in the study the use of specific place-based materials including primary source documents and artifacts as well as oral histories was central to program design. In fact, the utilization and incorporation of primary source documents was mentioned by all of the museum professionals who were interviewed as being a key part of the experience. From the Declaration of Independence and the Constitution to the Gettysburg Address, Washington's Farewell Address and Franklin Delano Roosevelt's speech following the bombing of Pearl Harbor, teachers were introduced to different strategies to analyze language and to utilize the documents in their classrooms.

> Well, I love the way that they've backed everything up with primary documents, like every single lecture session and every speaker shows you where they've gotten this information from and what primary documents have supported this and I think that's extremely powerful. (Mount Vernon Focus Group)

For Gettysburg's "Days with Documents" program, teachers are given a complete set of documents at the beginning of the session and then led through a series of activities to bring them to life throughout the workshop. A typical set or box of documents might include

everything from the Declaration of Independence, the Constitution and the Louisiana Purchase to the Gettysburg Address and correspondence between key leaders leading up to, during and after the War.

> Figuring out how to make primary documents accessible to younger students was really helpful and I also like learning about different locations to look for them… learning what they had available was really, really helpful because…they have access to things that I wouldn't necessarily have known about. For example, there is a man who was killed in action at Gettysburg from New York, who the only thing that they found on his body when he died was a picture of his children and so they had a wood carving made of the picture and they put it in papers all over New York and his wife saw the picture and identified him…so we discussed how you would go about identifying this person? And then what happens to these people? And even though that's something that is specific to the Battle of Gettysburg, I actually use that when I talk about reconstruction, like how do people put their lives back together after something just catastrophic. (Cindy, Gettysburg Military Park)

Learning how to use primary source documents to make history come to life for students of all ages was something that the participating educators discussed at Gettysburg as well as Mount Vernon.

Artifacts were also utilized in a number of different ways. All sites offered a tour of their research library where books and papers are stored. At Mount Vernon, in particular, teachers enjoyed getting to go into the vault and see some of Washington's original letters and documents. At the WWII Museum, there was a session dedicated to the archives with one of the

Museum's curators where teachers could see examples of propaganda used on both sides of the war.

At Monticello, teachers expressed a strong desire for things that students can actually hold – something tangible that is not on a screen. Specific kits of artifacts are used during on-site tours or "roundabouts" but the teachers also expressed a desire to have these same tools to use with their students in the classroom.

> We're completely one to one in my district so kids look at an iPad all day. They don't even have textbooks so like they don't ever hold anything tangible. It's all on their iPads. I think it just creates a different experience. (Monticello Focus Group)

In order to meet this need, most of the sites offered some form of a traveling trunk program where replicas of real artifacts can be shipped to a school for teachers to use in the classroom.

> They have a traveling trunk that they send out to schools and it has different replicated artifacts that create a hands-on experience for students and they have recommendations for how you use them…like there is an activity about the Gettysburg address where students take apart the vocabulary for it…there's also a lot of things about everyday soldier life like a uniform replica…and I use those in conjunction with some of the documents that I received at the professional development sessions. So we look at some of the letters that people are writing and look at the items and try to piece together what it was like…almost like an archaeology style activity with more of an investigative style. What can we learn about these people based on this particular set of artifacts, both written and physical artifacts…That can help students with different learning styles and different levels of interest engage in the activity. (Cindy, Gettysburg Military Park)

The opportunity to touch and interact with artifacts is obviously one of the benefits of an actual site visit with students, but teachers would also like for institutions to make this possible through other avenues such as traveling trunks.

Because programs like the summer institutes attract teachers from all over the country, they are not aligned to specific state standards but rather focus on the Common Core which is more skills-based and emphasizes the importance of building historical thinking skills and empathy in students beyond the memorization of specific people and events from history. Making this transition to skills-based instruction can be a challenge for some teachers.

> We need to be proactive in helping them see the connection between what they're being asked to teach…it's a struggle for teachers to move from content-based social studies instruction to a skill based one…it's really hard to do and we museums are the experts in doing that. It's what our curators and historians do…we take source material and we draw conclusions from it…It's showing them how to think like a historian…here, you're not just learning the content, you are learning how we understand it. (Educational Leader, Mount Vernon)

In general, each of the sessions observed was highly focused on the utilization of primary source materials and informed by feedback from teachers. Further, by intentionally offering teachers the time and space to practice their own historical thinking skills, participants discovered new and innovative ways to also teach their students how to think like a historian.

Creation of Community/Respect for the Profession

Another goal in addition to showing the teachers how to effectively utilize the resources provided was the creation of a community of practicing advisors. In other words, the institutions sought to both honor the participating teachers and also to build a collaborative relationship so

they may be called on in the future for ideas and input. Most of these immersive experiences are either completely free or mostly free for teachers with all travel expenses being reimbursed which indicates the value that the sponsoring organizations place on building a network of skilled professionals that can serve as ambassadors in the field.

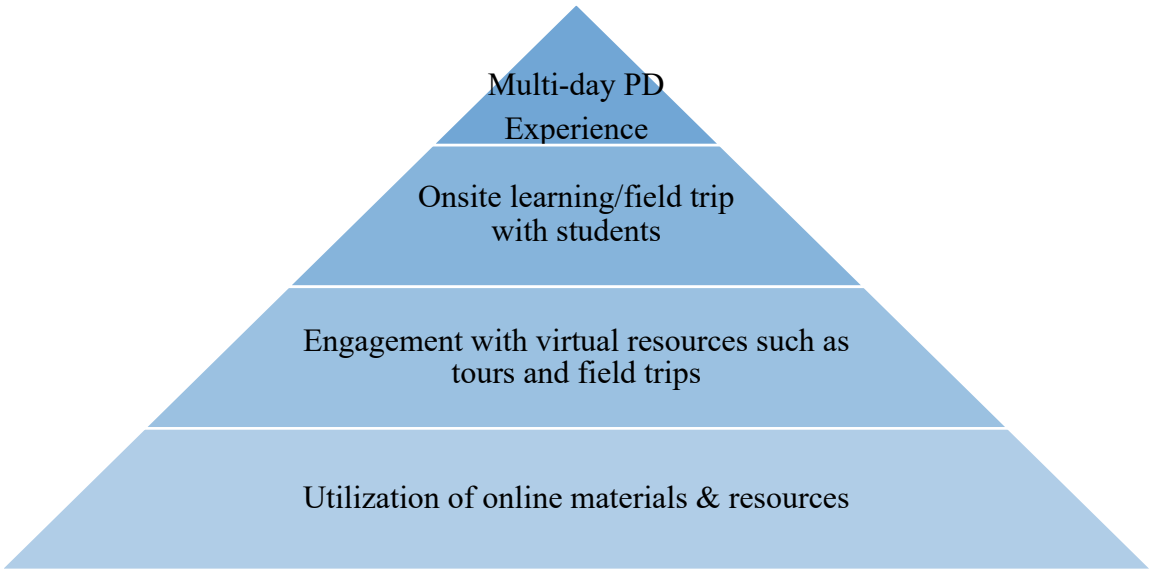
Throughout each week-long observation, one could see the teachers getting to know one another more deeply, building relationships over shared meals and discussions and by the time the sessions ended, each group had taken it upon themselves to create a way to stay in contact with each other utilizing technology. They were also building and deepening their relationships with the staff members and the institutions themselves:

> Recognizing that good pedagogy means you give people time to think about what they're learning and not just dumping out information and saying you can think about that later. What's always been a part of our program has been social time in the evenings like the cocktail reception when you're starting the week…we want to support and build the cohort so that even in their relationships with each other, they're reinforcing their relationship with Mount Vernon. (Educational Leader, Mount Vernon)

The education team at Monticello describes engagement with teachers as a pyramid with low-touch opportunities as the foundation and high-touch experiences like a summer institute at the apex. The idea is that as teachers move up the pyramid, their relationship and engagement with a site deepens alongside their relationships with peers through shared interests and experiences.

Figure 6

Engagement with Teachers Defined



The visits and interviews uncovered a wealth of resources and experiences available to teachers that remain hidden or unknown to many. Many of the teachers had been to multiple summer experiences at a wide variety of institutions. One teacher at Mount Vernon described it as "catching the bug" and becoming a "workshop junky." There is even a private Facebook group called "Scholarships, Grants and Summer Institutes for Teachers" with approximately 13,000 followers that features summer learning opportunities and scholarships for teachers which is a great resource for those who know about it. In addition, some of the participants knew each other from other experiences offered through the National Endowment for the Humanities, the Guilder Lehrman Institute of American History or other sites such as Colonial Williamsburg and the USS Midway. In other words, teachers likely to attend one of these time-intensive learning experiences are also more likely to attend others.

For the organizations who host these "apex" experiences for teachers, the benefit is described by the team at Mount Vernon as creating a whole cadre of ambassadors. These are people who encourage their peers and colleagues to participate in future learning opportunities

via word of mouth. They also serve as a ready group of professional educators who can offer feedback on future programming ideas both informally and formally as part of ongoing also ongoing advisory groups. In fact, the museum educators responsible for designing and delivering experiential learning opportunities for teachers have formed their own network called the Teacher Insights Group.

> It's a group of museum professionals who do teacher PD, that grew out of that research that Christine Barron did at Monticello and it's very informal. It's about 90 educators at this point and about 30 or 40 different institutions. And we just get together every once in a while and swap stories and share research and share what's working, what's not working. (Educational Leader, Mount Vernon)

Based on what they have learned and observed, the team at Monticello has recently published a book entitled *Bringing Teachers to the History Museum – A Guide to Facilitating Teacher Professional Development*, published by Rowman and Littlefield. It is described as a practical guide for designing experiences similar to those explored in this study or at least based on some of the same concepts and ideas.

> We have learned as much from these teachers as they have from us. They enormously help us like keep our finger on the pulse of what is happening in classroom…the moving cultural norms of students and what they're excited about and interested in and techniques and strategies that we use with students on tours and in our own programs and staff training are things that I've learned doing the Teacher Institute and vice versa. (Educational Leader, Monticello)

In terms of ongoing contact with the teacher participants by the hosting institutions, many museum professionals expressed a desire to strengthen and/or formalize their support for educator networks in the future:

> There's a few different projects that we're gonna be launching within this next school year that I think will help with ongoing engagement, one is a teacher advisory committee and I already know that there are teachers from this cohort and from Munich that are going to be interested in participating in that. So I think that's one way especially for teachers from these programs who are very clear leaders for us to continue to maintain that relationship with them, but then also to utilize their leadership as well. I think one of the other things that we've talked a lot about is just having that master teacher position in future summer seminars is going to be really important. (Museum Educator, National World War II Museum)

Across the experiences that were observed, the majority of the seven principles of effective professional development identified and defined by Linda Darling-Hammond and her team at Stanford University were present (Darling-Hammond et al., 2017). These include:

Figure 7

Characteristics of Effective Professional Development

1. Is content-focused
2. Incorporates active learning **utilizing adult learning theory**
3. Supports collaboration, **typically in** job-embedded contexts
4. Uses models and modeling **of effective practice**
5. Provides coaching and expert support
6. Offers opportunities for feedback and reflection
7. Is of sustained duration

Note, (Darling-Hammond et al., 2017).

At all of the participating sites, the emphasis on content and collaboration was clear. In addition, the sessions that were observed included active learning, modeling and multiple opportunities for feedback and reflection. Each institution also had mechanisms in place to continue to communicate with alumni including e-newsletters. Some, such as Mount Vernon, also allow educators to attend multiple sessions if they are accepted based on the applicant pool. Mount Vernon also hosted a reunion in celebrated of the 20th anniversary of their summer institutes for teachers in 2019.

> We were really thinking about that as a culminating year since we started in 1999 and we've got it in our plans to do a 25th as well. We invited the faculty that had taught at all of the sessions over the 20 years and we live streamed it back before live streaming was commonplace. And, you know, people could bring their families. And so it was wonderful that they could share some of the things that they've found so great but it wasn't sort of heavy in terms of academics…it was a real nice opportunity for them. (Educational Leader, Mount Vernon)

Beyond the content and deep learning that takes place through immersive and experiential professional development opportunities, perhaps one of the biggest benefits is the chance to treat teachers like true professionals and to honor them for the work they do in classrooms each day.

> I think it's validation for them in terms of their passion for history and that it's something they're in interested in learning so they can bring it back to their students. I also think it's about just raising their profile in their own communities, giving them a chance to represent a national institution among their peers, and giving them the responsibility and the authority to do that. And again, this idea of the opportunity to really understand the

> powerful role of interpreting history – that's what they're doing and they're asking their students to do instead of just teaching what the story has passively been…it's that sort of active approach to history. It's a big responsibility and knowing that they have our support and our endorsement for doing that work in their community can be powerful. (Educational Leader, Mount Vernon)

At a time when fewer and fewer people are considering the teaching profession and people are leaving the classroom in large numbers, the benefit of making teachers feel valued and appreciated should not be understated. The teachers also appreciated the opportunity to "choose" to participate in the experiences versus being required to attend as they are for much of the professional development offered in their districts.

Multiple Perspectives & Critical Conversations

The third theme that emerged in terms of program design and delivery is the idea of seeing historical events and people through the lens of people with different points of view. The concept that history is interpretive by nature came to life for participants as they explored lines of inquiry related to who is doing the interpreting? Whose story is being told? And whose story is being left out of the conversation? Helping teachers to unpack this concept so they can pass that understanding on to their students is one of the key learning objectives articulated for the Institute at Mount Vernon:

> The first is to gain knowledge of George Washington in the world that he lived in. The second is to examine political, social, ideological and economic histories and concepts. We want to make sure that we're looking at these things from different perspectives, different interpretive or historiographical approaches. And then we want to analyze primary sources in order to investigate Washington and the founding era. So primary

> sources a big part of that. The fourth one is we want to address inclusive histories that reflect the diversity of the 18th century. One of the things that became very clear to us is that it's hard for a lot of people to see the 18th century beyond white men because they're the people that are writing the documents that people are reading today. So we just wanted to be proactive about making people understand what the 18th century looked like - that there were lots of different people interacting with each other from different backgrounds, different races, different economic classes. The fifth one is to create and utilize strategies for the classroom that encourage discussion and inquiry. So that's just putting our classroom methodology a little bit more specifically forward. And the sixth one is relevancy - how the 18th century is relevant to today's modern world. (Educational Leader, Mount Vernon)

Because social studies teachers are often challenged with introducing potentially controversial topics and guiding difficult conversations in the classroom, offering them language and tips for how to do so effectively was a stated learning objective.

In fact, at each of the sites the emphasis on a specific event or era of history offered the opportunity to go deep on a particular topic and to offer multiple perspectives. An emphasis was placed on historical thinking skills and the notion of “and.” This idea was expressed at Monticello and seemed to resonate as a way to capture the notion that you don’t have to erase one person’s history in order to add the narratives that have largely remained untold. You can do both. At WWII, for example, there was time devoted to thinking about the experiences of American POWs as well as the people who were placed in Japanese internment camps. At Mount Vernon, a similar discussion took place on George Washington’s views on slavery and emancipation and how they changed over time as evidenced by his writing. Similarly, one of the

most poignant moments on the Monticello house tour for many of the participants was when the guide stopped to point out the imprint of three small fingers on one of the bricks facing the famous West Lawn. She described how the enslaved children were responsible for turning the bricks as they were removed from the kiln to dry in the sun and that is most likely where the fingerprints came from. Many of the participants indicated that they intended to take this image back to their students to tell the full story of who actually built the famous structure.

One of the educational leaders at Mount Vernon described their goal of emphasizing the interpretive aspect of history in the following way:

> The thing that we can see definitively is that it changes teachers' relationship to history…by being at a place that is actively interpreting and actively doing research, teachers are able to better understand that what they're teaching their students is not the events of the past…what they're teaching their students is an interpretation of the past and it activates their responsibility and their students' responsibility in that there is a voice of interpretation in the work that they're doing. (Educational Leader, Mount Vernon)

At a time when politics is influencing and sometimes dictating what can be taught in American classrooms, teachers are on the front lines of that debate and sometimes uncertain of how to tackle difficult subjects such as slavery:

> I'm a white person teaching about slavery…it's just really horrible to think about, you know, as an adult, so teaching it to young people has always been something I was nervous about. I don't want to traumatize the children in my classroom by teaching about other children who have been traumatized while they were enslaved. But I guess I just realized like it's something you need to deal with…the world needs to understand how slavery impacted our country. And the descendants of that are still living…miles away

> from this plantation, they're still living there. There's no denying the fact that they exist. So you really do need to teach children about that. (Erin, Gettysburg Military Park)

At each of the institutions visited, specific time was devoted during the week for dealing with difficult conversations in the classroom. These sessions were often led by a teacher facilitator for those institutions who utilized a practitioner as part of the program.

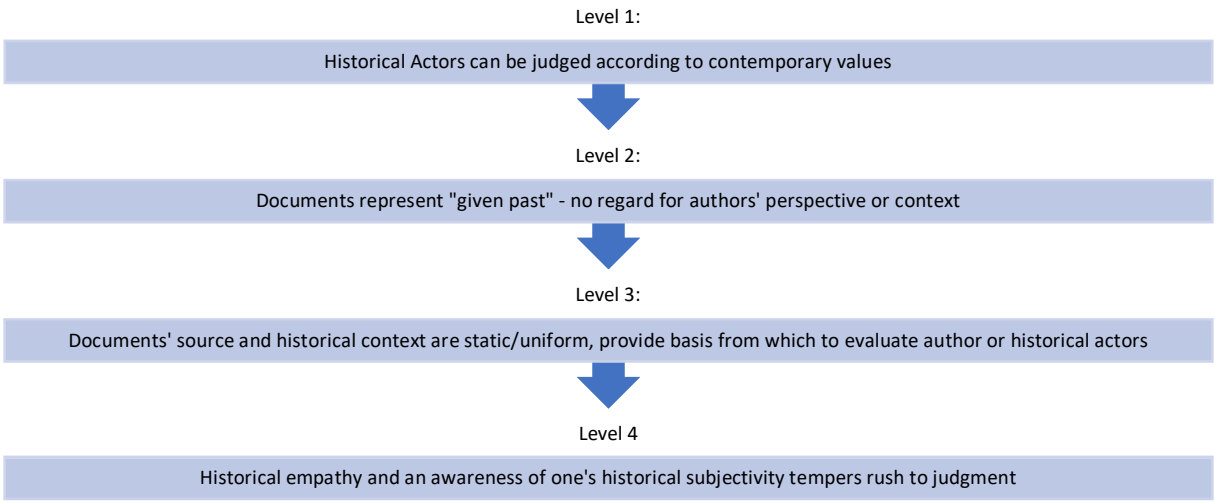
> Right now, you know, our teachers are facing real challenges about not just what the content is, but if they're even legally allowed to teach it. And they're the only ones that know the challenges facing them in their classrooms. So with a facilitator who is a practicing teacher as well, he or she can really speak to what that means for the specific content that we're working through more so than our staff can. So each day there is usually some sort of facilitator time, or sometimes the scholar or the facilitator work together and really work through the problems as they're emerging. (Educational Leader, Mount Vernon)

In short, professional development opportunities like those described in this study can help provide both language and tools that teachers can then use in the classroom to tackle difficult subjects and to offer multiple perspectives on topics and events that have the potential to be contentious. By placing primary sources at the center of program design along with feedback from participants and colleagues, the participating organizations created authentic learning experiences for educators. They emphasized the importance of managing challenging conversations in the classroom and the creation of a community of professionals who can support one another and serve as ambassadors for the institutions in the field. Finally, they used the experiential learning opportunities as a way to show respect and appreciation for the teaching profession more broadly.

While not stated as a specific goal, the organizations were helping to build historical thinking skills as defined by Carretero and his colleagues (Carretero et al., 2012) with the program participants.

Figure 8

Historical Thinking Skills



Note. (Carretero et al., 2012).

As the teachers worked together to analyze the language in specific documents or primary sources, they discussed the meaning and the context. At Mount Vernon, in particular, they used actual letters and writing samples to explore how George Washington's views on slavery evolved throughout his lifetime and the impact that the war had on his perceptions of people of African descent. Similarly at Monticello, Thomas Jefferson's contributions as a scholar, a founding father and a leader were presented and discussed alongside his relationship with an enslaved woman, Sarah "Sally" Hemings. In this way, educators were exposed to the idea that both Washington and Jefferson were men of their time and they were both courageous, revolutionary thinkers and leaders and they were also flawed. Again, while not included as a learning objective, this is a way to build understanding of people from the past and empathy for

the decisions they made at the time. To the extent that the teachers then incorporate their learning and their experience into their instructional practice, they have an opportunity to also build historical thinking skills in the students they teach.

Research Question 2: How Do Teachers Experience, Internalize and Act on These Educational Opportunities?

Each of the participating organizations leveraged the power of their location as well as the associated primary source materials in program design and delivery. For the teachers, standing in the place where important historical events actually occurred evoked both emotion and understanding. They also appreciated the community that was being created through shared experience and the ability to learn from respected scholars as well as other professional educators. By the end of each week-long experience, the participants generally expressed both excitement and confidence in their ability to share the learning with their colleagues as well as their students. Some commented on feeling renewed and appreciative of having new ideas and resources to use in their classrooms.

Power of Place

Prior research from Baron et al. (2019) has shown that two of the main benefits that teachers derive from professional learning at historic sites, in particular, revolve around the idea of "power of place." Teachers describe this concept as 1) being in the place where history actually happened; and 2) interacting with real experts including historians and archaeologists in particular. This theme was reiterated by the teachers interviewed for this study.

At Gettysburg, participants mentioned the opportunity to stand beside the tree where Abraham Lincoln delivered the Gettysburg address. One of the most powerful learning moments

remembered was when the participants were given a letter from a real soldier from their home state and then asked to find the grave of that soldier in the cemetery.

> There is an activity that they do with small groups there at the Park Service…where they have done research to find letters of soldiers who are buried there…the teachers are given a map of the cemetery and some basic information like we were given a knapsack that had different things in it to figure out who does this belong to because that's what they did in the aftermath of the battle…based on the stuff that this person had on them, who are they? After identifying who they are, then you'll be given the letters that they wrote home and then find where they're buried. And look at what they said to their family and their loved ones about why they were fighting the war because their reasons were all very different. (Cindy, Gettysburg Military Park)

At Mount Vernon, the teachers had a moment of reflection on the back lawn overlooking the Potomac River and talked about being in George Washington's house, in the places where he ate, slept and entertained. One teacher from South Texas stated that many of her students would probably never be able to visit the site themselves so she was taking selfies of herself throughout the site to share with them in the classroom. She said that if her students can see that she was actually there, it makes the place more real for them.

At the National WWII Museum in New Orleans, the power of place meant something slightly different which was the opportunity to explore the various galleries and exhibits inside the museum. Through guided tours, sometimes with an actual WWII veteran, teachers were able to immerse themselves in the various theaters of the war including the European Front, the Pacific Front and the Home Front:

> Our guide had that extra information to add to the story…like he was talking to us about the reason why they chose the USS Missouri to sign the surrender of Japan because of you know Truman being from Missouri. I saw some things…like the powerful image of the Shanghai baby, which is the picture of the baby sitting on the railway platform, just screaming you know, being able to look that up and see the after-effects to see what happened there was powerful. (John, National World War II Museum)

In the past, the WWII Museum has offered a different kind of place-based experience where teachers participated over a two-year duration. During year one, they attended one of the week-long seminars in New Orleans themed around one of the wings of the Museum and then delivered some form of "teach back" opportunity in their own schools and districts. In the second year, they actually traveled to one of the key sites involved in the War including various places in Europe as well as Pearl Harbor. The travel portion of this experience was paused during the Covid-19 pandemic. It also represents a significant investment on the part of the Museum. One of the education leaders interviewed, however, had just returned from Munich with the cohort from 2020 whose trip was canceled. She described it as a profound experience and expressed a desire to continue it as long as funding is available.

> What they (the teachers) said to me is being able to show the students that these places exist…that they were there adds an incredible amount of validity to what they're teaching and so that is what I've sort of consistently heard from the educators getting off of that most recent trip. (Educational Leader, National WWII Museum).

Christy had this to say about her experience in getting to travel to Germany through another international program:

> I think traveling to a place where it really happened...I was able to touch the Berlin Wall and I showed my students pictures of that…and you could see where the watchtower was - you could see how far would you have to run from the Watchtower to reach the wall and I think it gives you a totally different perspective rather than watching it in a video or, you know, seeing it in a picture…I think that's probably why the museum part of it is so beneficial because I know it's not the place where it happened, but you kind of feel like you're going to the place where it happened. You feel like you're immersed in it. (Christy, National World War II Museum)

The teachers also commented on the ability to interact with subject matter experts from the sites, especially resident historians and archaeologists. For example, the archeologist at Monticello described findings from recent excavations across the grounds and showed artifacts that were discovered ranging from nails, buttons and eggshells to ceramic pieces, furniture fasteners and marbles. Through these objects, she explained how they are learning more about the daily lives of enslaved people at the site. Similarly at the National WWII Museum, the group heard lectures on a variety of topics ranging from military strategy in the Pacific to the experiences of Japanese Prisoners of War from staff historians. In terms of general feedback about their experiences and impressions, the teachers appreciated when the lectures were combined with time to explore. For example, teachers at Gettysburg typically engage in classroom-based activities or lectures in the morning and then spend time out on the battlefield in the afternoon. This combination allows participants to interact with both internal and external experts, to ask questions and to deepen their own subject matter knowledge while also leveraging the Power of Place theme described above.

Professional Network and Personal Growth

For the teachers themselves, another benefit is a network of like-minded professionals who can be consulted when facing a particular challenge as well as a source of new ideas and teaching strategies. One of the teachers from the National WWII commented that she did not really understand why people said that teaching can be a very isolating profession when you are technically with other people all day. Once she became an educator, she understood the need to be able to have time to talk to other teachers, to share ideas and to problem solve together. This is one of the benefits that was mentioned consistently across the different sites.

> The other actual quote that always sticks out in my head, which wasn't in a survey or anything, it was from a teacher who came back bringing his students on a field trip. We're just standing in the visitor center talking…and he said I didn't have a professional network before I came here and now I do. That's pretty powerful. (Educational Leader, Monticello)

The experiences at both Mount Vernon and the WWII Museum included 25 and 28 teachers respectively. These were much larger than the cohort at Monticello which was just 10 teachers due to a decline in applications following the Pandemic. It was, however, evident that it was easier to form collaborative relationships more quickly in the smaller group.

> This is the first one that I have been in with this small group…you're typically with like 30 teachers. You don't get to know everybody and you don't have that same sense of collaboration. You might talk to one person. (Monticello Focus Group)

At the sessions observed at Monticello and the National World War II Museum, the majority of the participants were secondary educators teaching at either the middle or high school levels. At Monticello, for example, there was only one elementary educator and she

talked about the struggle to find time for applying some of the lessons when social studies is treated as a "special" along with art or music and classes are held on only certain days of the week. She expressed getting around this by incorporating the special subjects together and showed pictures of a Colonial theater production she had her students perform the year prior with authentic clothes she made herself to teach the children about period specific textiles. Similarly, the participants from Gettysburg were also either secondary teachers or administrators. The one exception was Mount Vernon where there was a mixture of both elementary and secondary educators. Because of this, for some of the sessions focused on classroom application, the two groups would be separated to discuss age and grade appropriate strategies. While adding a layer of complexity to the session, the teachers expressed appreciation for the benefits of being together and learning from one another:

> I also liked the fact that when they group us to do any kind of short activity, we're not always with the same teachers. Exactly. And we're not always with the same grade level. When you collaborate back at our schools, you're in your teams of teachers so you're seeing content at your same grade level. But I'm learning so much being with high school teachers and middle school teachers and teachers who are teaching different classes, and I liked that part of this workshop. (Mount Vernon Focus Group)

In addition to building and cultivating relationships with peers, the learning experiences can lead to additional career growth opportunities including incremental compensation. At Mount Vernon, for example, one of the lead teachers was an educator who first became involved with the organization as a participant in a summer teacher institute. He then returned as a fellow conducting his own research in the library and finally, was recruited to serve as one of the lecturers with a focus on classroom application. The same was true at the WWII Museum in New

Orleans. A teacher from a local high school was serving as one of the lead presenters and facilitators, bringing thoughts and ideas about how he teaches students about the War in the Pacific in particular.

> He brings his students to the museum every month. And so we were not initially going to have a master teacher. I was going to be facilitating this jointly with my boss, but then he left and so the museum opened up additional money for us to hire people to help us. And actually, I think it worked out significantly better…it's a framework that I want to use moving forward…next week we're gonna have a master teacher and a lead scholar, and I think that's what this week is missing…I would like to be able to pay both a master teacher and a lead scholar to be with us for the entire week.(Museum Educator, National World War II Museum)

The teachers also expressed appreciation for having a practitioner as part of the content delivery team:

> You know, I've been teaching for 17 years. So sometimes you get stuck in a rut. And you're like, wait, I used to do that. Alright, I'm gonna pull that back out of my hat, you know. I feel like he (the teacher) understands that…he's showing us this is what I talk about and how we approach it. But then he also says, okay, I'm gonna throw this in because this is what I would do with my class. So you have a good mix of the strategy and the content. (Christy, National World War II Museum)

Each of the week-ong experiences included social receptions and offsite dinners where the teachers could converse and learn from each other more casually and allowed time for fun and rejuvenation. Many commented that they were learning just as much from each other as they were from the presenters and educational facilitators. From the taverns at Mount Vernon and

Monticello to Café Du Monde in New Orleans, these are experiences and memories that the teachers will take with them as they begin a new school year which will undoubtedly include a host of challenges.

> We talk at our table and we share stuff but it might be when we're going to dinner and you just happen to mingle with someone else and you start talking about how you're doing stuff…and they say, oh, I have a great lesson for you. We're sharing resources with each other…I feel like it's really the camaraderie and the conversation over dinners and lunches and ways that you can implement something at your school that maybe they have in another state. I was talking to one of the girls that was sitting at the table with us, she teaches in LA and she teaches an ethnic studies class. And we were just kind of talking about how I can incorporate that into my school. Her school is very ethnically diverse. Mine is like probably 89% white but she was giving me ideas like well, what if you did this? What if you did that? So it's almost just brainstorming through friendship, at the table over food. (Christy, National WWII Museum)

One participant at WWII did mention that would be nice if they had a chance to get to know one another a bit either before the start of the session or when they first arrive so the process of coming together as a cohort could start earlier, but that was one of very few constructive critiques of the program. Overall, teachers were extremely appreciative and honored to be part of a cohort of like-minded colleagues and for their affiliation with the hosting organizations which was a definite point of pride.

Sharing the Learning/Classroom Application

There is both a formal and informal expectation that teacher participants will share the learning with others back in their schools and districts. Mount Vernon was the only institution

that required documentation of a professional development session to be created and delivered by teachers who participate in the Summer Institute.

> We have three requirements for their presentation. It needs to align with our mission in a meaningful way for the community that they're from. Second, they have to reach teachers that are outside their daily interactions…we don't want to just have a department report. And so maybe that's teaching at a neighborhood school or teaching, you know, at a social studies conference at the state level. And the third thing is just administrative. We ask them to report back what they did and that reporting can be as simple as I did it, or it can be like, here's the PowerPoint that I used. We provide an evaluation form for their teachers to fill out so we can understand how our mission came across in their session. We really just encourage them to think about what their experience was that week, and what they feel is most important for their school district to learn. (Educational Leader, Mount Vernon)

At both the WWII Museum and Monticello, teachers actually developed their ideas for sharing during the session and delivered the content to the other participants. At WWII, participants could choose to work in a group for this activity called “Ignite Talks” or they could present individually. On the final day of the session, they delivered their presentations which focused on an individual lesson centered around a primary source document, one of the oral histories they learned about during the week or both. John, for example, planned to have his students interview somebody that they know over the age of 65 and then create a PowerPoint slideshow presentation for their classmates and a short, written summary for submission.

At Monticello, program leads returned to the concept of the power of place and each participant delivered a short talk (three to five minutes) while standing in a relevant location in

and around the main house such as the gardens, the cemetery or Mulberry Row where the enslaved people lived. All of the lessons and activities created by participants are then made available on their web site for other teachers to access and use. One teacher, in particular, delivered a compelling talk about the "pedagogy of partnership" or POP, and described how she sees her role as an educator while standing beside the grave of Thomas Jefferson:

> It doesn't matter what I teach – it matters what my students learn…so I try to avoid leading them…When we work together to understand text, I ask them what is the text telling you instead of what do you think?...We talk about what they notice and wonder and construct meaning from there…I want to know how certain things change their perspective….I see my role as a guide and facilitator – I'm not there to tell…Thomas Jefferson was insatiable in his search for knowledge and I want my students to leave with more questions than answers.

John, the only administrator who was interviewed, created a comprehensive presentation including a variety of tools for the other teachers in his district to use ranging from photographs and letters to references in popular culture including clips from movies such as *Glory* and *The Red Badge of Courage* along with *Gone With the Wind* and *Saving Private Ryan*.

> I was a science teacher…so, you know, doing labs and experiments and things like that, it's natural for me, but you know, for math teachers and English teachers and art and social science teachers doing hands-on things might look different. So I think that's the biggest thing…having these primary sources to use in all subjects. That's the point I'm trying to get across to my faculty. In English, for example, there are tests where the students have to read a passage and then they have to analyze it…to pick out information

> and using primary sources, that's a great way to practice (John, Gettysburg Military Park).

In addition to sharing the learning with other professionals in their schools and their districts, some of the teachers also participate and present at professional conferences such as the annual NCSS meeting. These presentations are sometimes done independently with support from the organization who hosted the institute or seminar and sometimes they are delivered jointly with members of the staff. In addition, a few of the participants also teach courses at the college level for people entering the field:

> I want to figure out how I can use some of the resources that they've shared with us to redo one of the classes that I teach at UCF in the social studies course for future teachers…it's a content course, and we do a great deal on the founding of the *government,* the Constitution and citizenship and civics…it's a web-based course through Canvas and I keep thinking about how I can insert some of these additional resources in there for the future teachers.(Mount Vernon Focus Group)

Both the museum professionals designing the experiences as well as the teacher participants commented on the desire to balance content with classroom application. One teacher from Monticello described it as the balance between thinking and doing:

> I really liked the Mount Vernon program on slavery intellectually…it was a lot of lecture based content but also discussions about slavery and the impact on our students including the social emotional aspect. So that changed the way I thought about slavery. I work at a vocational school so hands-on learning lessons are really useful for me… I think this (Monticello) is much more public history…we have the living history of Thomas Jefferson and we have the children's programs which is very different than Mount

> Vernon…where there can be an hour lecture. It's very intense…not necessarily applicable to the classroom but changes the way you think, which to me is why thinking and doing are very different experiences. (Focus Group participant, Monticello)

Teachers generally expressed a desire for both the intellectual stimulation provided by lectures and sessions from outside experts but also want to be able to apply what they are learning in their daily work. This can be a tricky balance to achieve while also offering immersive experiences that leverage the power of place. One of the participants interviewed attended both the sessions observed at Mount Vernon and Monticello and commented that Mount Vernon was a bit lecture heavy but very stimulating while Monticello had no presentations from external experts or scholars which was an intentional decision by the program designers but seemed to be a missing piece for her.

> Some workshops, you know, they give you a lot of information on the surface…I like the way each of the speakers is going really in depth and is extremely knowledgeable in a very narrow focus area. For example, I had no idea about the beginning of the Cabinet, and while I knew that the Capitol wasn't in DC, I certainly have learned more about how Washington worked in New York for a while and then Philadelphia and so that has filled in a lot of gaps for me. (Mount Vernon Focus Group)

At Mount Vernon, particular care was also given to the types of scholars who are invited to attend.

> The goal in finding an academic lead scholar is to find someone who is an expert in their field or someone who is up and coming. You know, it's great when you have a familiar name, but it's more important that you have someone who has a huge amount of respect for where the teachers are coming from…they have the expertise in the content, *but the*

> teachers in the room have the expertise of how to teach it to their students and there needs to be a mutual respect between the teacher and the lead scholar…We've moved away from some more high powered names in that arena to people we feel like are actually cultivating a really strong relationship. (Educational Leader, Mount Vernon)

At all of the participating sites, teachers received tangible tools to use in the classroom – handouts, posters, lesson plans and more. For the institutions, the workshops offered an opportunity to train teachers in a hands-on fashion how to use the extensive materials that they produce. When asked about specific elements or activities that teachers intended to actually use in their classrooms, a range of experiences were described. At Mount Vernon, jigsaw activities were used to model a collaborative learning technique to engage students in a variety of topics ranging from the Bill of Rights to the Constitutional Convention and many teachers expressed a desire to replicate the activities with their students. At Monticello, an interactive timeline activity as well as the approach to teaching about slavery resonated with the participants including the tour devoted to telling the story of enslaved people at the site. At the WWII museum, significant attention was devoted to the utilization of oral history in the classroom. Throughout a week-long session hosted in July of 2022, teachers listened to a variety of clips from soldiers and civilians to tell the story of the war through multiple perspectives. Many of the teachers stated that they had never used oral history before but felt confident in their ability to use the resources provided by the Museum moving forward.

> I feel like I probably will use a lot of the oral history clips for sure. The lessons - I had already used one before I ever applied to the program - it was race and the war in the Pacific because like I said, that was a subject that I wanted to expand my knowledge on. I think the kids found it fascinating to see that there was propaganda on both sides,

> showing that the other person was evil. It's just interesting I think for them to look at the war from that perspective versus, you know, like a battle. (Christy, National WWII Museum)

WWII was also the most developed in terms of offering inter-disciplinary programming, which the teachers seemed to appreciate. At the same time that the Voices from the Pacific seminar was being offered to humanities teachers, there was a similar workshop taking place for STEM teachers. The STEM program facilitator came over to deliver sessions on water and on how to make an atom to show the teachers how they could partner with a colleague from a different subject area such as English Language Arts (ELA) or science. The teachers felt that this would be easier to do at the elementary grades versus secondary where subject lines can be more rigid and the breadth of content to be covered leaves less room for flexibility.

> I really liked the STEM guy that came in but it's really difficult as a high school teacher to do kind of interdisciplinary lessons. I do have all the freshmen for world history, but it's very uncommon that they would have the same person for math and science. So to incorporate that STEM across to another class might not work. But I'm also teaching a current events course this year so that water lesson he did with us... I could totally use that in my current events class because that could be a branch for us to go into talking about water across the world. And our school actually just had a piece of land donated to us with a small body of water and some wildlife. They donated it with the intention that the school has to use for learning so the science teachers are really gearing up for that and I thought - my current events kids can go across the street. We can scoop up some water and then we can get water from their home and water from different places and test it with the pH and we can talk about clean water and what people have access to. And then

> that can branch off into even bigger lesson…that got my wheels going not for my world history class, but for my other current events class. (Christy, National World War II Museum)

Teachers commented positively on the number of ideas they gathered to increase relevancy for students and to help emphasize the importance of civic engagement. At Gettysburg, for example, one of the sessions listed as a favorite focused on the war in popular culture – such as in movies, songs, and books. This helped the teachers to connect the material to things familiar to their students:

> Students love individual stories that kind of help them understand the bigger picture. They can hang on to stories of people who maybe resemble themselves in some way…at Gettysburg, there was a story of a boy who was a resident of Gettysburg and he was nearly kidnapped by the Confederacy when it came through to be conscripted into military service and he talked about how people came out and stopped him from being kidnapped. And, you know, students are used to their parents wanting to know where they are and…stranger danger and all those kinds of things. And so those are things that are relatable to them. And making things interactive…looking at the letters between this person and this person to figure out what went wrong in their relationship and why this happened politically…those are the things that they remember and then that helps them see that bigger picture. (Cindy, Gettysburg Military Park)

In terms of impact on students, neither the teachers nor institutions described robust plans or processes for measuring outcomes. For one, it would be extremely difficult to determine causality since there are so many variables that impact student learning, especially in the midst of

a global pandemic. In regard to trying to collect longitudinal data, one museum professional commented:

> It's a hard thing to do and to organize…you would really need to do it with only a couple of teachers and a couple of teachers who you already know…and that might even bias the information…The problem is one of the most common ways to collect data is having the teachers rate their own efficacy and that's also kind of hard. (Museum Educator, National WWII Museum)

In 2018, Mount Vernon did conduct an ex post facto evaluation in preparation for the 20th Anniversary of their Summer Institutes in addition to the surveys that are done annually to measure participant intent to use the content they learn in their classrooms. They also conducted one longitudinal investigation which showed a change in the language students used to describe George Washington.

> I asked teachers who were coming to Mount Vernon in the summer to ask their students what words came to mind when they heard George Washington, Mount Vernon and history…it was just a three-question survey for their students to fill out and we did it again at the end of the school year...We were able to see a difference in the words they used to describe George Washington and the words they used to describe Mount Vernon but not so much in the words they used to describe history. It wasn't huge, but with Washington, the amount of people that said President decreased, which for us is a good thing…it's not just that he was the President. The variance in the words that the kids were using was more diverse. We saw an increase in the number of kids using the word leader in the way that they described him. It was really fun to sort of poke and prod in looking at

> that but I've never shared the results beyond our stakeholders…I used it to just help explain what we were seeing. (Educational Leader, Mount Vernon)

Each of the seminars that were observed included sessions focused on content as well as classroom application. The content sessions were often delivered by resident historians as well as academic researchers while the application sessions were delivered by a practicing teacher who also served as a facilitator. Teachers seemed to appreciate this balance and the incorporation of practical examples and resources that they could use in their classrooms immediately. While it is outside the scope of this study to measure the impact on classroom practice over the long term, the participating teachers did express a strong willingness and desire to share the learning with their peers and their students.

Conclusion

While a total of six themes were identified, three for each of the research questions posed, some were overlapping. For example, the creation of a community of practice or professional network had benefits for both the hosting organizations as well as the educators themselves. Similarly, both commented on the importance of utilizing primary sources and maintaining a careful balance between content knowledge and classroom application. In short, there is power in the professional learning opportunities for teachers that can be created in the places and spaces where history actually happened and where it is studied and interpreted by experts. In addition, such experiences can help teachers with some of the challenges they are facing today in a politically polarized world. In terms of program assessment and evaluation, most of the institutions are focused on the feedback from teachers and their desire as well as efficacy to transfer the learning. All of the institutions offer surveys, usually at the end of the

week, but one participant described an experience where she had the opportunity to offer feedback daily which while time-consuming helped in recall because the learning was still fresh. In Chapter Five, some of the recommendations for further research will focus on the opportunity to study the impact on classroom practice over time and the potential meaning for student outcomes. In addition, these free, immersive experiences could have implications for the design and delivery of professional development and continuing education for teachers more broadly.

CHAPTER FIVE: DISCUSSION AND RECOMMENDATIONS FOR PRACTICE

Many museums and historic sites across the country currently offer multi-day experiential professional development (PD) opportunities for teachers. The purpose of this study was to understand the theories and frameworks that inform the design of such experiences and to explore the ways that teachers who participate internalize and act on what they learn. The two theoretical frameworks that served as the foundation for the study include Knowles' six pillars of andragogy or adult learning and Kolb's Theory of Experiential Learning. The idea was to explore how museum professionals are intentionally or unintentionally incorporating the principles identified by Knowles and Kolb into the design of PD seminars and institutes for teachers. These principles include 1) a problem orientation 2) leveraging the intrinsic motivation and experiences of adult learners 2) allowing time for reflection and 4) active experimentation (Taylor & Kroth, 2009).

Table 6

Relationship between Kolb and Knowles

Kolb's Theory of Experiential Learning	**Knowles' Theory of Andragogy**
Creation of concrete & engaging experiences	Intrinsic Motivation & Need to Know
Reflection	Experience & self-concept
Abstract conceptualization	Readiness to Learn
Active experimentation	Problem orientation

In addition, the seven characteristics of effective professional development defined by Linda Darling-Hammond and her team at Stanford University served as a benchmark for understanding the quality of the experiential learning opportunities offered by each participating institution (Darling-Hammond., 2017). These characteristics are: 1) content focus 2) active

learning using adult learning theory or andragogy 3) support for collaboration in a job-embedded context 4) the use of modeling 5) ongoing coaching and support 6) the inclusion of feedback and time for reflection and 7) support over a sustained duration.

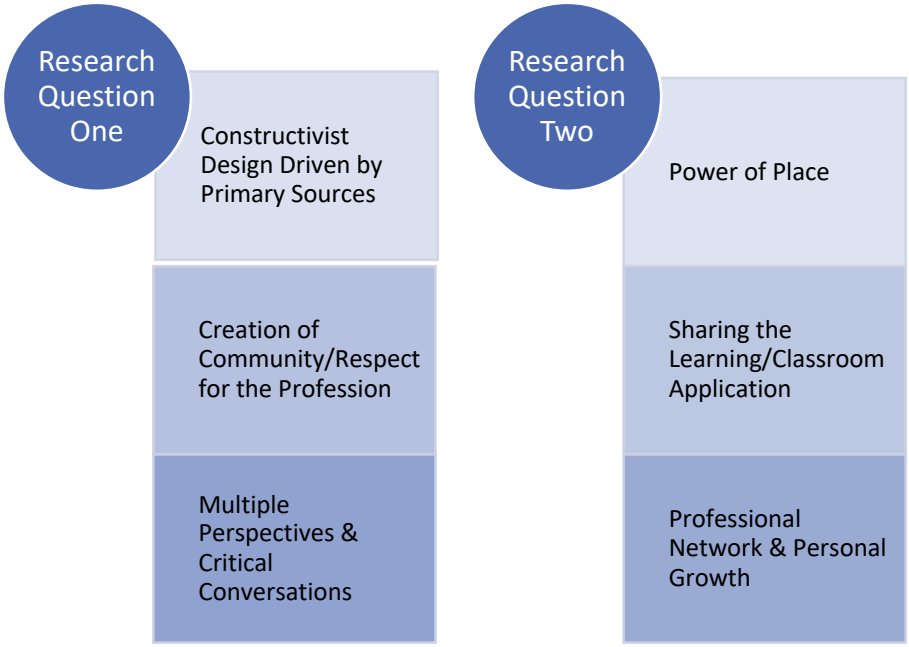
The qualitative study included a series of interviews and focus groups with museum professionals and teacher participants at four sites – Gettysburg National Military Park, Mount Vernon, Monticello and the National WWII Museum in New Orleans - along with informal observations at three of the sites that were offering in-person programming during the summer of 2022. A total of six themes were identified, three for each research question that was posed. In this chapter, recommendations are presented for ensuring that a wide range of teachers have the opportunity to take advantage of such opportunities, especially those serving the most disadvantaged students, and for further research on the impact of this type of professional development on classroom practice. An evaluation plan for the recommended solutions is also included.

Discussion of Findings

As outlined in Chapter Four, a total of six key themes emerged from the study. The themes relate both directly and indirectly to the five recommendations that follow and they they are summarized in the figure below:

Figure 9

Summary of Emerging Themes



The first three themes relate to research question number one: What principles and goals underpin the design and delivery of experiential learning for K-12 teachers at key U.S. historic sites and museums? The findings were based on interviews conducted with six museum professionals responsible for the design and delivery of experiential learning opportunities for teachers. In general, the design for immersive PD experiences at the participating museums and historic sites was focused on the utilization of place-based primary sources along with feedback from participants and peers and not on any specific learning theory or framework. The majority of program designers who were interviewed described taking a constructivist approach to their work with a goal of helping teachers to better understand and utilize the resources offered by their organization. Each multi-day immersive experience did, however, meet a key criteria for adult learning as defined by Kolb in that they were all concrete and engaging. In addition, the

teachers who participated chose to apply to be there and give up time during their summer break, demonstrating their intrinsic motivation and readiness to learn as described by Knowles.

Themes two and six were related in that both the institutions hosting the PD experiences and the teachers who participated described the creation of a community or professional network of practitioners as an important benefit. For the museums and historic sites, this took the form of an advisory group of practicing teachers to offer feedback on future programming ideas and a network of institutional ambassadors who can spread the learning and encourage their peers to engage with the organization. For the teachers, it helped to reduce feelings of isolation by cultivating relationships with like-minded peers as well as professionals who could serve as a resource and help them work through classroom challenges they might encounter down the road. In addition, some of the museums and historic sites offered additional opportunities for professional growth through fellowships and/or the chance to serve as a part-time facilitator during future seminars or institutes. The fact that both Mount Vernon and the National WWII Museum actually engaged former participants to serve as facilitators for many of the sessions focused on classroom application demonstrated their desire to leverage the experience of the participants, another key component of andragogy as defined by Knowles.

Each of the four sites intentionally looked at the historic content being presented through different lenses and perspectives which was appreciated by the teachers. Through both content and classroom application sessions, teachers were offered practical and creative strategies for tackling sometimes contentious topics such as slavery with students. Though the participating sites did not list the development of historical thinking skills as a learning objective and they did not actually refer to the four different levels described by Carretero et al. (2012), the participants who were interviewed spoke about specific tools such as language and activities that could help

them build such skills in their students and better manage difficult conversations in the classroom. By utilizing personal letters, photos, and oral histories, participating sites each demonstrated their desire to have diverse groups of visitors, teachers and students be able to see themselves in the stories of people and events from the past. For the participating educators, this was viewed as a strategy to help them to solve a current challenge they face in their classrooms on a regular basis. This approach aligns to the suggestion made by both Kolb and Knowles that adult learning should focus on the solution of real problems.

Themes four through six relate to research question number two: how do teachers experience, internalize and act on these educational opportunities? A total of five interviews and two focus groups with teachers were conducted at the four participating sites for a total of 11 educators whose voices were captured. The participants liked being able to learn from outside scholars as well as fellow educators in the place where important historical events actually occurred. The "power of place" was evident in the utilization of primary source documents and artifacts but also in the emotional response from the teachers as they stood in the places and spaces where history actually happened from the back lawn at Monticello to the cemetery at Gettysburg. Generally, teachers were offered time to reflect on these experiences throughout the sessions during small group and collective discussions. Teachers at some of the sites did, however, express a desire to have more time to unpack the learning or for reflection on their own which aligns with Kolb's framework. By the end of each experience, the teachers generally felt excited and empowered to share their learning with their colleagues back in their districts as well as the students in their classrooms. In many cases, the teachers were actually creating and building real lessons and activities during the week-long PD experiences which mirrors another component of Kolb's framework which is active experimentation. The materials created by

participants for these activities were then shared with other educators on the website of the museum or historic site. In other cases, the teachers intended to share their learning more broadly through professional conferences or teaching at the collegiate level.

In general, the informal observations that were conducted revealed evidence of both Kolb's Theory of Experiential Learning anf Knowles' definition of andragogy in addition to at least five of the characteristics of effective professional development. Because these experiences were designed to be place-based and immersive rather than job-embedded, collaboration within a school setting and ongoing support and coaching over a sustained duration were not observed. However, the feedback from educators about their experiences at each of the four sites was overwhelmingly positive and enthusiastic. Many commented on the reasons why they prefer these types of experiences over the more traditional PD typically offered in and required by their school districts. They also expressed a desire for more teachers to be aware of and participate in immersive PD like that observed as part of this study. Thus, the first of the recommendations below deals with the expansion of outreach to specific types of teachers who might benefit from such experiences.

Recommendations

The recommendations that follow are offered to inform the design and delivery of experiential PD for teachers at other museums and historic sites such as the Alamo in San Antonio, Texas, as well as to inform future researchers interested in this topic. The recommendations focus primarily on the intentional recruitment of a more diverse group of teachers, ongoing support for those who do participate as well as ideas for the development of a plan to document the impact on teaching practice. In addition, the recommendations could have implications for those responsible for designing professional development for teachers more

broadly, particularly those working at the district level. The five recommendations are summarized in Table 2 below.

Table 7

Overview of Recommendations

Relevant Findings	**Recommendations**
The majority of teachers participating in multi-day experiential professional development opportunities at the museums and historic sites where informal observations were conducted were white or Anglo with significant classroom experience	1. Include relevant demographic information in the application process including data about the students they serve as well as programming targeted to teachers who are younger and earlier in their careers and those who teach various subjects and grades
Ongoing support provided by the participating institutions to the teachers was informal and inconsistent	2. Dedicate staff resources to create ongoing communication strategies to maintain engagement with past participants and to provide support during implementation and execution
Make institutional resources such as primary source documents and artifacts more accessible to teachers	3. Digitize and organize resources on a web site specifically designed for teachers that is easy to access and search and include lessons and activities that require less classroom time
The participating museums and historic sites did not have a mechanism in place to measure the impact of the professional development on classroom practice over time	4. Develop a plan using surveys and observations to track both changes in classroom practice as well as impact on student performance
Many of the teachers who were interviewed preferred the place-based professional development experiences over more traditional, “sit and get” sessions required by their school districts	5. Districts should consider the principles of andragogy and the role of choice in creating meaningful professional development experiences for teachers and leverage the learning from teachers who participate in multi-day experiential learning opportunities

Recommendation One: Increase the Diversity of Participants

When it comes to the diversity of teachers who participate in multi-day professional development opportunities, there are multiple factors to consider. The first, of course, is demographic diversity, but there is also an opportunity to consider the demographics of the students they serve along with teacher tenure and the grades and subjects that are taught. If one of the goals of these educator experiences, whether stated or not, is to develop historical thinking skills in teachers so they, in turn, can develop those same skills in their students, then reaching those teachers who need this type of support the most could be beneficial. First, it would ensure that teachers serving our most disadvantaged students would have the opportunity to build both their content knowledge and their instructional skills and it would bring an even wider array of perspectives and personal experiences to the discussions that take place during the seminars. Thus, this recommendation relates most directly to the theme of including multiple perspectives in order to effectively manage critical conversations in the classroom.

Diversity of Experience and Students Served

Most of the teachers who were interviewed were veteran educators with more than 20 years of experience in the classroom. In addition, they were mostly white or Anglo and from middle-income districts and schools. Many of them had participated in multiple experiences at various museums and historic sites becoming self-proclaimed “frequent flyers” of this type of professional development. This contributes to a rich but relatively small network of professionals who are aware of such opportunities and likely to take advantage of them. When asked why more of their colleagues may not take advantage of such experiences, three reasons were offered 1) they may not know 2) they could have personal or family conflicts such as having young children at home or 3) they just don’t care.

As a point of reference, the teachers in the Mount Vernon focus group each had more than 20 years of experience in the classroom. They said that they do work hard to share the information with their colleagues, but they still might not take advantage because of a lack of interest, time or personal finances which can also be a constraint for those experiences that are not fully funded.

The question raised from these observations and comments is whether or not the teachers who need it the most either because they are teaching in lower-income, marginalized communities or they are relatively new to the profession are able to take advantage of these immersive learning experiences. As a way to attract a more diverse set of participants, four suggestions are offered:

1) Develop a specific marketing and recruitment strategy that targets low-income campuses and districts.
2) Include personal as well as school demographic information on the application such as Title 1 designation and percentage of students eligible for free and reduced lunch.
3) Ensure that all expenses are covered through additional fundraising activities.
4) Offer a shorter program over an extended weekend specifically geared toward beginning teachers who may have different needs in terms of their learning.

Diversity by Grade

In addition, the majority of participating teachers taught at the secondary level. This speaks to a potential need to specifically target elementary social studies teachers who also might have different needs. Mount Vernon was the only site that offered breakout sessions during the program specifically for elementary teachers. The participants liked being able to learn from their secondary peers during general content sessions and then the more targeted programming

that occurred for those sessions focused more on classroom application. With this mind, institutions that offer such experiences should think about how they target and attract elementary teachers and also how they tailor programming to meet their specific needs. Because social studies is not a tested subject in the early grades, it can sometimes get squeezed out of the curriculum and in some schools the subject is treated as a "special" subject similar to art or music and not offered every day of the week (Heafner & Fitchett, 2012). Museums and historic sites could support elementary teachers of history and social studies by offering creative strategies for maximizing the time that they do have with students and working with their colleagues on interdisciplinary lessons. If teachers in the early grades are given the training and tools, they can begin to build historical thinking and empathy skills in students at a much younger age. This learning can then be scaffolded and deepened at the secondary level.

Diversity by Subject

The National WWII Museum in New Orleans was the only site that included sessions focused on STEM education which the teachers enjoyed. One of the program leaders there thought it would be interesting to have teams of teachers from a particular campus participate at the same time. This could help teachers to work together to design multi-disciplinary lessons that meet changing and evolving state standards. For example, a team of teachers from a middle or high school who teach a variety of subjects ranging from U.S. History, English/Language Arts and geography could participate together to create a project-based learning unit that spans the different domains. As mentioned in Chapter Two, the national curriculum standards for social studies were rewritten in 2010 to focus less on specific dates and events and more on the development of specific skills such as historical thinking. The C3 framework (College, Career and Civic Life) was then introduced by the NCSS in 2013 specifically to assist states in adapting

their social studies standards to meet the new requirements (Grant et al., 2017). The framework emphasizes multi-disciplinary practices and concepts with inquiry placed at the center of instruction. Museums and historic sites have an opportunity to support educators in making this instructional transition by offering professional development experiences that demonstrate how to weave together different subjects such as civics, economics, government, geography, and history. Including more than one teacher from a specific school would also help with the creation of a campus community comprised of educators who experienced the PD together and could continue to support one another and hold each other accountable during implementation.

Recommendation 2: Provide Intentional Ongoing Support

As expressed in two of the emerging themes from the study, both the organizations hosting the professional development experiences as well as the teacher participants saw the creation of community as a benefit. For the organizations, it was an opportunity to create a group of practicing advisors who could offer feedback on future programming ideas. For the teachers themselves, the creation of a professional network of like-minded peers helped to reduce feelings of isolation. Teacher isolation can be driven by multiple factors including the physical structure of schools where the majority of work is conducted in individual classrooms, the lack of time afforded for professional collaboration and feelings of being overwhelmed (Ostavar-Nameghi & Sheikkahmadi, 2016). To the extent that immersive experiences at museums and historic sites can help to foster and enable higher levels of collaboration with peers, such opportunities can also help to reduce the loneliness that teachers sometimes experience which can lead to burnout and eventually exiting the profession. Teachers at the participating sites generally felt that they could call on each other or the staff from the hosting institutions if they needed assistance with a particular challenge in the classroom or just wanted to bounce ideas off of someone in the future.

While the participants took it upon themselves to create channels for staying in touch through social media, the institutions did not have formal ways of keeping the community together. Mount Vernon, for example, was the only institution who had hosted a reunion or convening for past participants.

The recommendation, therefore, is to create a plan for ongoing communication with participants beyond e-mail. This could take the form of regular virtual check-ins as well as future in-person convenings. The goal would be to ensure that there is a mechanism for teachers to communicate to the institutions and to each other how they are utilizing what they learned over time. There could even be incentives or awards for teachers who go above and beyond to share their experience with their colleagues and with students. Another suggestion would be to have a specific staff person designated to follow up with past participants to keep them engaged. This person could offer ongoing coaching and support, observe teachers using the material in their classrooms, share innovative ideas with the group and also publicize additional career growth opportunities. For example, at Mount Vernon and the National WWII Museum in New Orleans, teachers who were once participants in the program progressed to become facilitators who were delivering much of the content focused on classroom application. With dedicated staff resources, hosting organizations could help ensure that more teachers have access to these sorts of opportunities.

Recommendation Three: Continue to Make Institutional Artifacts and Resources More Accessible to Teachers

It was evident during the informal observations that the hosting organizations used the multi-day learning experiences as a way to train teachers on how to effectively use both primary sources from the collection as well as other resources that they produce such as lesson plans and

curriculum. When it comes to classroom resources offered by museums and historic sites, there are two main considerations – ease of access and time. The first relates to making the resources easy for teachers to find as in the traveling trunks that some institutions provide which are trunks filled with replicas of artifacts that can be shipped to a campus or classroom. This is a physical example of how to engage with teachers who cannot bring their entire classroom for an in-person field trip or experience. The other way to make entire museum collections more accessible is through digitization. This is also a strategy to help increase the number and diversity of teachers who have access to materials and resources and therefore relates to the theme of including multiple perspectives as well as the theme of sharing the learning to an even wider audience.

> I think, another weak spot of the museum is access to our digital collections, you know, we have a lot of really fantastic resources but they're not super accessible to teachers…We need to put oral history clips that are both shorter and more produced on our YouTube channel and have them in playlists that are organized by standards, topics and events. There's a lot of room for growth, and I think that will help not only keep teachers connected to the museum's resources once they leave here because they can easily access it but will also help us reach out to even more teachers because the first thing I did when I was in the classroom when I was struggling to come up with a lesson plan or a lesson activity, I googled it and if you're teaching six lesson blocks, you know that's what you do, especially if you're early in your career, and you haven't had the chance to really build up your curriculum yet. (Museum Educator, National WWII Museum)

As referenced in this quote by a program leader at the National WWII Museum in New Orleans, when creating and building digital resources, it is critical that they are easy to search by specific content or standard. Teachers need to be able to find what they are looking for quickly.

The second consideration also referenced in the quote is the importance of time. Teachers need activities and lessons that are easily adapted into the classroom regardless of geography. They do not have a week to spend on any given historical topic as in the PD they experienced given the breadth of material that they are expected to cover in a year. Thus, museums and historic sites can help by breaking lessons and activities into more manageable increments of time. For example, shorter oral history or video clips can be organized and presented as tools for introducing students to a specific topic as they enter the classroom. Similarly, primary source documents can be accompanied by activities that take less than 15-20 minutes to complete with a group of students. At Monticello, the teachers participated in a timeline activity featuring quotes from different historical figures using language from the Declaration of Independence. The point was to open a conversation about how the notion that "all men are created equal" has meant different things to different people throughout our nation's history and is still a topic for debate. Such an activity could easily be used to facilitate a discursive lesson focused on a few essential questions for students to consider. This is a very specific example of the theme related to classroom application and the desire for teachers to have access to tools and materials that can be put into practice right away.

Recommendation Four: Develop a Mechanism to Measure the Impact on Classroom Practice Over Time

This recommendations also relates directly to the theme of classroom application and was also the most significant gap that was identified. Of the participating sites, only Mount Vernon

attempted to understand longitudinal impact of the professional development experiences they offer by tracking changes in the language that students use to describe George Washington in one teacher's classroom over a two-year period. In addition, as stated in Chapter Two, the only formal study looking at the impact over time was conducted by Christina Baron and her colleagues at Columbia University over a three-year period looking at teachers who had participated in summer institutes at Mount Vernon and Monticello (Baron et. al, 2020). Using Q-methodology in pre- and post-interviews, they studied the impact of HSBPD on four specific domains: 1) historical thinking and analysis 2) historical pedagogical content 3) peer collaboration and feedback and 4) general pedagogy using diverse perspectives. They saw the biggest impact on factors 1 and 2 and found that through place-based instruction where teachers experienced "history in action," they were able to see how new findings and discoveries impact the interpretation of history in real time. In addition, by engaging in dialogic instruction as learners, the teachers reported a desire to transfer the same methods into their classrooms.

There are complexities in this type of analysis, but to the extent that the goal is to actually change what happens in the classroom and to benefit students, it represents the largest opportunity for further research. Such research would need to be linked directly to the learning objectives for each program. Through the collection of both self-reported data, classroom observations and student growth information, the institutions could better assess whether or not the stated objectives are being met. Again, if one of the goals to be pursued is the development of historical thinking skills in both teachers and students, then strategies should be developed to measure changes in both attitudes and behavior. For example, if the inclusion of multiple perspectives is an intentional part of program design as it is at Monticello, program designers could capture what the past participants say has changed about their practice, observations could

be done to assess the inclusion of different lenses and students could also weigh in on whether or not they felt this strategy was being used effectively. Through a combination of surveys for both teachers and students as well as formal observations of specific lessons, the introduction and utilization of multiple perspectives to teach about significant historical events and people could be tracked over time along with changes in how students think about those people and events based on Carretero's et al. (2012) four stages of historical thinking.

Recommendation Five: Consider Implications for other District-led Professional Development Opportunities

Many of the participants who were interviewed commented that most of the professional development that they take part in within their individual districts is mandatory and driven by district level priorities. They preferred these multi-day experiences because they had the opportunity to choose to apply to those institutions focused on their specific subject and area of interest. This speaks to the need to allow teachers to have discretion and choice when it comes to participation in professional development (Walter, 2012). It also reinforces two of the six principles of andragogy first described by Malcolm Shepherd Knowles which is the importance of intrinsic motivation and the need to know in driving adult learning (Taylor & Kroth, 2009).

The second key takeaway for school districts and other providers is the balance between content knowledge and classroom application and the use of outside scholars as well as practicing educators. Participants felt professionally respected and intellectually stimulated by the opportunity to learn from actual historians, archaeologists, and leading academics. Each of the institutions worked diligently to balance lecture with actual activities that could be replicated in the classroom with students relating back to the themse of both classroom application and respect for the profession.. At Mount Vernon and the National WWII Museum, the classroom

application sessions were led by active teachers which the participants appreciated. At Gettysburg, they specifically appreciated the opportunity to learn from experts in the morning and then to head out onto the battlefield to explore in the afternoons. This is important insight for other more traditional professional development opportunities that are often referred to as "sit and get" sessions and speaks to the theme of "power of place."

Further, the home districts of the teachers who invest their own time to participate in multi-day, professional development experiences at museums and historic sites should think about how they can leverage that learning to serve even more educators and build community within the district at the same time. For example, the designers of other district-led professional development experiences could spend time with the teachers to understand the specific speakers, activities and resources that had the greatest impact on them and why. Certain ideas and concepts could then be woven into other programs offered by the district. Second, districts should consider how they can spread nad share the learning beyond just a one-day session required by the hosting organization. This could be as simple as recording the session for other teachers who aren't able to attend in person. In addition, other social studies and history teachers could participate in observations of a specific lesson or activity designed based on the PD experience being delivered to students. Finally, the districts could identify a social studies or history teacher on each campus to participate in a professional learning community (PLC) with the teacher or teachers who attended the PD session. Research suggests that well organized and supported PLCs can have a positive impact on both teaching practice and student achievement (Vescio, Ross & Adams, 2008). The goal of the PLC in this context would be to understand the design of classroom activities using the resources the participating teacher learned about followed by an observation and then a debrief to discuss the reaction from students. This would require time away from

direct instruction on their own campuses, but it could lead to higher levels of collaboration and a sense that teachers are being given the freedom and space to hone their craft which links back to the themes of respect for the profession as well as the support of professional networks and personal growth for teachers.

Evaluation

As mentioned above in recommendation four, any museum or historic site such as the Alamo that chooses to invest in multi-day experiential professional development opportunities for history and social studies teachers should consider how they will evaluate the impact on the participating teachers as well as their students. As outlined by Kirkpatrick and Kirkpatrick (2016), there are four levels of evaluation that should be considered. Because the Kirkpatrick model was first created to evaluate the effectiveness of organizational training programs, it can easily be applied to professional development experiences for teachers which are also a form of training. The first level in the model is the general reaction to the experience which the institutions participating in this study captured using surveys. These surveys were used to make programmatic tweaks and changes and to measure feelings of efficacy among participants as well as their intent to implement what they learned. In the Kirkpatrick model, shifts in knowledge and skills as well as attitudes are defined as learning. This is where the hosting organizations included in the study stopped any formal measurement or evaluation which means they were not currently assessing levels three and four – behavior and results.

Level One: Reaction

Kirkpatrick describes the short surveys or tools used to capture a participant's initial reaction to a program or intervention as "smile sheets." In the case of the informal observations conducted at each of the four participating sites for this study, the reactions from educators who

attended the week-long sessions was very positive which is an important indicator for justifying the continuance or expansion of this type of professional development. The surveys that were used were typically issued to teachers on the final day of the experience and collected before they left. This is best practice according to Kirkpatrick in order to insure high completion and submission rates (Kirkpatrick & Kirkpatrick, 2016). In contrast, the surveys at Monticello were issued two days following the seminar and participation fell to 45% of teachers. The surveys generally included questions related to specific speakers, activities, and resources as well as questions related to feelings of motivation and excitement to utilize the materials that were shared. In addition, many of the institutions also hosted quick wrap-up discussions at the end of each day to capture key insights and ideas and these were documented. Below are a few of the highlights captured by a program leader at Mount Vernon in terms of responses from teachers:

- Teachers felt that not only did they walk away with a better understanding of George Washington's life and legacies, but also will use Mount Vernon digital classroom resources to support the study of Washington and Mount Vernon.
- Teachers appreciated the intentional choices made to include women, indigenous and enslaved individuals, and underrepresented communities in the 18th century during the majority of sessions.
- Teachers will use Mount Vernon digital museum, archaeological, and library collections online to provide inquiry-based primary source learning opportunities for their students.
- Teachers were engaged throughout the institute due to the mixture of the types of sessions and experiences that were included and were excited to bring this engagement back to their students.

- Teachers expressed the need for increased time for independent reflection and processing away from others and the site amidst intense days of professional learning and networking.

Level Two: Learning

This level of the evaluation model would be used to determine the changes in attitudes, knowledge, and skills of participating teachers. Two of the hosting organizations – the National WWII Museum in New Orleans and Monticello – had participants actually demonstrate their learning during presentations at the end of the week-long experiences. In New Orleans, this took the form of "Ignite Talks" which could be conducted individually or in groups and focused on a specific concept or theme that they intended to use in their classrooms and included classroom strategies as well as resources from the Museum. At Monticello, the teachers similarly developed a specific lesson that they intended to use with their students and delivered their presentations in a place representative of their topic such as near Mulberry Row where the enslaved people lived or next to the cemetery where Thomas Jefferson is buried. These lessons were then submitted to Monticello staff to be uploaded to their website and shared with other educators as open-source material.

Another way to capture changes in knowledge would be through a test or short quiz based on the content of the seminar or teacher institute. This could be administered at the end of the week either electronically or using paper and pencil or could be woven into an interactive game such as Thomas Jefferson Jeopardy or a family feud format with the teachers divided into teams. Tests or quizzes would also be easy to administer of the beginning of the week and then again at the end of the session to assess pre and post knowledge and skills. In terms of attitudes, such shifts could be assessed through focus groups and interviews similar to those that I

conducted at each of the sites. For these, a question protocol would need to be developed, especially in the case of interviews, to be able to compare and contrast responses from different participants. One specific area that might lend itself to this strategy would be changes in attitudes related to looking at historical events and people from multiple perspectives. It would be interesting to understand the changes in the attitudes of teachers that then might lead to changes in attitudes among their students.

Level Three: Behavior

This is perhaps the most important level to understand moving forward as it would capture changes in actual teacher behavior in the classroom. With that said, Kirkpatrick and Kirkpatrick do not recommend skipping the reaction and learning levels as they are designed to assess shifts that are necessary before changes in actual behavior can occur (Kirkpatrick & Kirkpatrick, 2016). There are two main strategies that could be employed to assess changes in behavior in this instance – the utilization of a control group and/or classroom observations. For both, a critical first step is the identification of a subset of participating teachers who are willing to engage over time. From there, intervals of measurement could be established such as once per semester over three years or even five years depending on the resources and commitment of the institution conducting the evaluation.

Proximity to the site or museum, demographics of the individuals and the students they serve, grade level and experience in the classroom are examples of the types of criteria that would need to be considered when establishing both the test group and the control. From there, a protocol for behavioral observations could be developed. In other words, based on the specific learning objectives and outcomes identified by the institution, specific behaviors could be identified such as the utilization of primary sources in the classroom or the incorporation of

inquiry-based instruction with a central question at the center of a specific lesson. Another metric would be the utilization of museum resources as well as both physical and virtual field trips. Even without the incorporation of a control, observations could also help inform such changes in individual behavior over time. For example, if a teacher heavily utilizes the resources and strategies that were included during the first year after attending the seminar or institute, does he or she continue to use them in years two, three, four and five? Also, do they continue to return to the institution's website or seek out other, similar learning opportunities if they change subjects or grades or are faced with a new challenge in the classroom? In addition, it would be important to understand to what extent they continue to remain actively engaged with the hosting institution and with each other because of the emphasis on the creation of community.

Level Four: Results

At this level, the hosting organization would move beyond the impact on the teachers in terms of their learning and behavior and begin to dive into the impact on students. Again, this could take the form of surveys to measure changes in student attitudes, knowledge, and skills. The surveys could be administered at the beginning of the school year following the teacher's participation in a summer professional development experience and then delivered again at the end of the year, once the educator has implemented the strategies that were learned using the museum or historic site's resources. This is the strategy that was employed by the team at Mount Vernon to measure changes in the language students used to describe George Washington. Another way to assess such changes in students would be through pre and post-interviews and/or focus groups administered once again at the beginning and end of the school year.

In addition, student performance on more formal assessments such as standardized tests could be tracked over time. In this scenario, the outcomes of students whose teachers participated

in a multi-day professional development experience at a museum or historic site could be compared with those who did not providing that the appropriate permissions to capture such data could be secured. The difficulty with this approach would be related to causality. It would be very difficult to prove that the seminar or institute itself was the driving factor leading to higher levels of student performance. Another way to get at the same question would be the utilization of a control and an intervention group. In this scenario, two teachers with a history of similar student outcomes in the same school serving the same type of students could be compared. One would attend the seminar or institute, while the other would not. Students in both classrooms would be given the same assessment of attitudes, knowledge, and skills at the beginning of the year and the end of the year to determine if one group's performance was substantially or measurably different from the other. This seems like a more likely scenario provided that the museum or historic site could identify a single campus or multiple schools that might be willing to participate. Similar to the methodology described in Level Three, such assessments could be delivered over the span of one year or multiple years to try to understand the impact and changes over time.

Suggested Evaluation Plan:

Based on the discussion above, Table 12 offers an overview of an evaluation plan based on the five recommendations:

Table 18

Evaluation Plan for Recommendations

Recommendation	**Reaction (Level One)**	**Learning (Level Two)**	**Behavior (Level Three)**	**Results (Level Four)**
1. Include relevant demographic information in the application process including student data as well as grade, subject, and years of experience	Track the relevant data collected over time Use "smile sheets" for any new programs targeted to specific groups of teachers	Use interviews and focus groups to determine if different types of teachers are internalizing and using the strategies & resources in different ways	Use classroom observations to also understand differences in actual practice in diverse types of schools, i.e. Title 1	Collect and track student data in addition to teacher data in order to measure trends in diversity over time
2. Dedicate staff resources to create ongoing communication strategies and implementation support	Create a database of all past participants Use surveys to gather feedback about whether the new strategies are working	Conduct focus groups and interviews to determine if there are other ways the organization could continue to support former participants	Track the number of teachers who continue to participate in cohort-based activities and coaching	Track the number of teachers who continue to serve as ambassadors by presenting at professional conferences and return as teacher facilitators at future seminars
3. Make institutional resources such as primary source documents and artifacts more accessible to teachers	Track site utilization once items from the collection are digitized Use surveys to gather feedback about the new tools	Conduct focus groups and interviews with teachers who are using the resources to gather suggestions for improvement as well as additional support	Use classroom observations of teachers to see how they are actually using the resources provided	Use student surveys, interviews or focus groups to gather student reactions to the resources being utilized by their teachers

Recommendation	Reaction (Level One)	Learning (Level Two)	Behavior (Level Three)	Results (Level Four)
4. Develop a plan to track both changes in classroom practice as well as impact on student performance	Conduct a comprehensive analysis of all prior survey data to understand trends and themes	Develop instruments for pre and post testing to understand changes in attitudes, knowledge, and skills	Conduct classroom observations to understand changes in practice for participants	Develop an instrument to conduct pre and posttests with students following their teachers' participation
5. Leverage the learning from teachers who participate in multi-day experiential learning opportunities	Conduct a survey of participating districts to determine whether or not they are leveraging the learning from their teachers who have participated	Conduct interviews and focus groups with districts to understand how they are leveraging the learning and sharing the strategies & resources more broadly	Conduct observations of PD sessions or PLC meetings with teachers conducted by past participants and/or based on the learning	Establish a control district and conduct surveys with students about the quality of history and social studies instruction they experience in those districts who regularly have teachers participate and who proactively leverage the learning versus those who do not

Limitations and Delimitations

Limitations are influences that exist outside of the control of the researcher while delimitations are those things the researcher has identified as being outside of the scope of the study (Creswell, 2014). The main limitation of this study is the inability to track the participating teachers over a longer period of time in order to truly understand the impact of the HSBPD experiences on actual practice in the classroom. Instead, the study captures their reactions to the professional development they experienced and their personal feelings of efficacy and

empowerment to be able to successfully utilize what they have learned. In addition, while four institutions can be considered an ambitious sample for one researcher, there are thousands more historic sites and museums across the country of all sizes and with very diverse missions and resource constraints. Therefore, the transferability of the insights and recommendations may be questioned based on their applicability to a different context. Even within the sample, the governance, funding and operational structure of each participating site was quite different. However, they are all large, well-established organizations with more resources than many other similar but smaller institutions.

Further, the study includes feedback and informal observations from only one teacher workshop or training at each location rather than assessing the full range of programming offered. There is a risk that the programs that were observed are not representative of the content, quality or impact of other, similar opportunities. There is also a chance that the participants themselves are not a representative sample. The type of educator who might be willing to participate in such opportunities may be atypical and, therefore, their views and opinions may not represent those of their colleagues and peers.

Another limitation is that each of the participating institutions was still in the process of rebounding from the COVID-19 global pandemic. In the case of Gettysburg, this meant that they were not offering in-person sessions during the summer of 2022. For the other three organizations, it meant that their application numbers were slightly below prior years and some of the teachers who were selected were unable to participate at the last minute due to illness. This may have impacted both the size and the composition of each of the participating cohorts.

The use of interviews and focus groups to collect data was also a potential limiting factor. Interviews are informed by memory as well as opinion which can be flawed as well as biased.

Selection bias could have also impacted participation in the focus groups held toward the end of each observed session as teachers of a certain type or profile may have been more likely to participate. In facilitating the focus groups, careful attention was paid to ensure that every voice was heard and that the conversations were not dominated by teacher participants who tended to be more outspoken. Another potential limitation was the willingness to participate on the potential diversity of the sample. There was a risk of selection bias both in the types of professionals who are motivated to attend such sessions as well as those who willing to participate in a focus group or interview.

This study was limited to the information and data gathered at the four participating historic sites and museums. Information gathered during interviews was limited to the director of education at each institution as well as the person responsible for professional development programs for teachers. The informal observations were limited to only one session or workshop at each site. In addition, the focus groups and interviews with educators were limited to three participating teachers at each location. There was not sufficient time to speak to each participant individually. Therefore, those who agreed to participate may not be representative of all attendees. Further, the participants who were interviewed may or may not represent the diversity of teachers currently serving in the more than 1,000 school districts in Texas or across the country.

This study is not designed to formally assess the effectiveness of the professional development opportunities that were observed. Rather, it provides insights that could be useful to other museum professionals about the design and delivery of such experiences for teachers as well as feedback and reactions from the participating teachers. Understanding those elements and

strategies that have the greatest impact on how they think about their work in the classroom could be helpful to others looking to offer similar programs.

Delimitations of the study include the fact that it was focused on in-service professional development experiences which are not the same as immersive learning opportunities for pre-service teachers whose needs may be quite different. In addition, the study was designed to be qualitative in nature and did not include a quantitative analysis of the survey results collected from participants at each of the four sites. It was also specific to history and social studies teachers participating in multi-day experiences at historic sites and one historically oriented museum which may not have application for other types of sites such as art institutions.

Suggestions for Future Research

The main suggestion for future research is a longitudinal study to understand the impact on classroom practice. While the reactions from teachers who participated in the experiential learning opportunities hosted by each of the four participating sites were generally positive and the teachers expressed a desire to utilize what they learned, the actual impact on behavior is not presently known. To the extent that offering such experiences represents a significant investment by each of the institutions, this seems like the next logical step in terms of measurement and evaluation. As noted by the teachers who were interviewed, their time is limited, and they have a great deal of content to cover in any given school year. In addition, some of the participating teachers commented on being moved by their districts to a different campus, grade or subject area which could also impact their ability to actually use the resources provided or to apply the strategies that were learned. Similarly, the impact on student performance and outcomes is not clearly understood. Through the utilization of pre and posttests as well as surveys and/or focus

groups, an analysis of the changes in student knowledge, skills and attitudes also represents an important area for future study.

To the extent that the positive reaction from teachers to this type of multi-day, experiential professional development could have implications for the design of other types of PD, this represents another significant area for further analysis. For example, if social studies and history teachers suggest that elements such as the utilization of primary sources, the presentation of multiple perspectives and the balance between content and classroom application are important elements of quality professional development, how might these principles be incorporated into other experiences offered at the district level? Further, how can districts fully leverage the learning from teachers who choose to participate in immersive opportunities that involve travel by sharing the insights with other educators as well as administrators? And finally, what resources and supports are needed to ensure that teachers who do participate are able to successfully apply what they have learned in the classroom with students?

Conclusion

The purpose of this qualitative study was to investigate the impact of experiential professional learning opportunities for history and social studies teachers hosted at museums and historic sites around the country. The underlying premise was that teachers must first experience and practice a more discursive and inquiry-based approach to history and social studies instruction as a learner before they can successfully implement such strategies in the classroom. A total of four sites of informal learning were included – Gettysburg National Military Park, the National WWII Museum in New Orleans, Thomas Jefferson's Monticello, and George Washington's Mount Vernon. Through informal observations of week-long experiences at three of the sites and a series of interviews and focus groups with both museum professionals as well

as teacher participants, the goal was to understand the theories that drive such learning opportunities and the benefits derived by both practicing educators and the organizations themselves.

Conducted in the summer of 2022 as the world was emerging from the COVID-19 global pandemic, the timing was significant given the highly polarized political environment in which history and social studies education is embedded nationally as well as globally (Yogev, 2013). The professionals at each of the participating sites articulated their goal to share multiple perspectives related to a specific person or historical event and to support teachers by offering language and tools that can be used to manage sometimes contentious conversations in the classroom. They also talked about the ability to express their deep appreciation for the teaching profession through immersive professional development experiences. In terms of program design and delivery, they described a constructivist approach driven by primary source materials and input from teachers. Having a community of engaged educators who could offer feedback on current and future programming ideas was described as one of the main organizational benefits.

For the teacher participants, the power of learning in the place where history actually happened and being able to bring that experience back to their students was a key benefit. Similar to the organizations themselves, they also expressed appreciation for having built a network of like-minded professionals that they could turn to in the future for ideas and support. The teachers also conveyed feelings of enthusiasm and efficacy when describing their plans to transfer the learning to their colleagues back on their campuses and in their districts. In short, the ability to travel to the actual site where a certain event took place or a person lived helped to make history come to life through interactions with subject matter experts and hands-on activities using real artifacts and resources.

As first described in Chapter Two and reinforced by this study, professionals at museums and historic sites have an opportunity to create meaningful, authentic learning experiences for teachers driven by clearly articulated learning objectives. These experiences can be strengthened by focusing on real challenges that teachers are facing in their classrooms, leveraging their personal and professional experience, and allowing ample time for discussion and reflection. The creation of community that occurs through such shared opportunities for learning is of benefit not only to the participating teachers, but also to the institutions themselves. In short, the findings described in Chapter Four could have important implications for museums and historic sites that are already hosting professional development experiences for teachers as well as those who are contemplating offering them in the future such as the Alamo in San Antonio, Texas. Further, the findings could also have significance for school districts and other providers who are designing PD for history and social studies teachers in particular. Thus, the recommended areas for further research and exploration include the impact on classroom practice and student outcomes as well as implications for district-designed professional development for educators. Prior research by Linda Darling-Hammond and her colleagues at Stanford indicates that most professional development is largely ineffective and tends to reinforce existing practice rather than positively alter instruction in the classroom (Darling-Hammond et al., 2010). In contrast, the experiences observed for the purposes of this study were chosen by educators who were willing to participate in the application process and to give up personal time to attend. Those who did attend rated their experience as very positive and generally felt excited and empowered to share the learning with others. Therefore, there could be important lessons for professional development designers and providers beyond those at museums and historic sites.

Further, during a time of heightened political divisiveness, Texas teachers as well as those across the country are often on the front lines of the culture wars in the United States. They are also being called upon to adjust their instructional strategies and practices to meet shifting standards which focus more on building cognitive practices and skills versus rote memorization (Kenna & Russell, 2014). Beyond offering traditional field trips, museums and historic sites have an opportunity to play a critical role in providing additional support to teachers as they work to make this instructional transition while managing difficult conversations in the classroom. In addition, at a time when teachers are leaving the profession in large numbers following the challenges presented by the COVID-19 global pandemic, the expansion of opportunities that make educators feel valued and appreciated is needed now more than ever. Sites of informal learning such as the Alamo should consider leaning into this opportunity with urgency and intention in order to offer critical support and resources to teachers of social studies and history. Since its creation in 1916, the subject of social studies was designed to assist in promoting civic engagement and the preservation of democracy (Hardwick et al., 2010). Therefore, it cannot and should not be overlooked in its importance as a subject and neither should the educators responsible for its successful delivery. Now is the time to increase the number of experiences that treat history and social studies teachers as professionals and provide them with the tools to deliver high-quality dialogic instruction that promotes historical thinking skills in students.

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Appendix A

Protocol for Interviews with Museum Professionals

Research Question:

1. What principles and goals underpin the design and delivery of experiential learning for K-12 teachers at key U.S. historic sites and museums?

Andragogy Construct	Staff Competency	Interview Question
Intrinsic Motivation	Staff members should be able to clearly articulate the internal educational philosophy that guides their work	Tell me about your educational philosophy here at _____.
Draws upon experience	Staff members should be able to articulate how the educational philosophy is manifested in the programs that are developed and implemented	How is that philosophy reflected in the programs that you offer?
Learning needs based on social roles	Staff members must understand the unique benefits of place-based professional development at museums and historic sites	How would you describe the specific benefits of participating in professional development at a museum or historic site?
Intrinsic Motivation	Staff members must be motivated to prioritize inquiry-based professional development for teachers among other, competing activities and initiatives understand the unique	I know you have many priorities as an organization. How do you view prioritizing professional development for teachers among competing initiatives and activities?

Problem centered/ immediate application	Staff members should be able to clearly articulate the design process utilized to create new PD opportunities for teachers	Tell me about the process you use to design new or different professional development opportunities for teachers.
Draws upon experience	Learning objectives should be clearly defined as part of understanding whether or not they have been met	What are the primary learning objectives for the PD that you offer?
Problem centered/ application of knowledge	Problems of practice to be addressed should also be clearly identified	What are the specific problems of practice that you focus on helping teachers to solve?
Draws upon experience	Strategies should be grounded in the principles of andragogy and an understanding of what constitutes effective PD	Tell me about any theories or principles that help to guide the instructional strategies that you use.
Learning needs based on social roles	Staff members should be able to articulate defined processes for engaging teachers and encouraging their participation	How do you go about recruiting teachers who can benefit from the programming you offer? What barriers and challenges do you face in terms of recruitment, especially in the midst of a global pandemic?
Self-directed learning	Staff members have spent time reflecting on why teachers should participate in the PD that they offer – what are the benefits of attending?	What is the value for teachers who participate in PD here at _____?
Problem centered/ immediate application	Staff members should be able to describe the process for gathering feedback from teachers who participate in PD	How do you solicit feedback from teachers who participate?

Problem centered/immediate application	Staff members should be able to recall both positive and constructive feedback from educators that has been internalized and considered	What type of feedback have you received from teachers about their experience at ____?
Problem centered/ application of knowledge	Staff members should have a process for understanding whether or not the learning objectives have been met	How do you assess any changes in classroom practice for the teachers who participate in your PD programs?
Self-directed learning	Staff members should be able to articulate what is being done to support the development of a learning community among participants	What if anything do you do to develop and support a learning community over the long term?
Problem centered/ immediate application	Staff members should be able to describe what strategies if any they are utilizing to understand the transference of learning into the classroom	How do you measure the impact of the PD on students?

Appendix B

Protocol for Focus Groups/Interviews with Teachers

Research Question:

2. How do teachers experience, internalize and act on these educational opportunities?

Seven Principles of Effective PD	Questions
1) Content-focus	Overall, how would you describe the learning experience here at ____? What did you learn that you didn't know before in terms of content?
2) Active learning	How did the instructional strategies that were used either enhance or detract from your engagement?
3) Supported collaboration	In what ways were you and your colleagues encouraged to collaborate during the session?
4) Coaching and expert support	What types of coaching and expert support were provided to you by the staff?
5) The use of models and modeling	How were the strategies that you were learning about modeled during the workshop?
6) The use of models and modeling	How were you given opportunities to practice and/or model the strategies for the other participants?
7) Opportunities for feedback and reflection	Tell me about some specific "a-ha" moments you had during the week/weekend.

8) Sustained support – what happens after the workshop or intensive?	How are you feeling about your ability to transfer some of the things you learned into your classroom? What challenges and/or barriers do you think you might face? Do you expect and hope to receive support from _____?