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Embedding Threshold Concepts in a Large Lecture Course:
An Examination of Uptake of Disciplinary Actions

A Dissertation submitted in partial satisfaction of the requirement for the degree of

Doctor of Philosophy in Education

by

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by

Susannah Thacker McGowan

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ABSTRACT

Embedding Threshold Concepts in Large Lecture Courses:

An Examination of Uptake of Disciplinary Actions

by

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Research in teaching and learning in higher education in the last fifteen years addresses the importance of integrating disciplinary ways of thinking – i.e. an understanding of the ways that questions are asked and investigated within disciplines -- in undergraduate courses. However, the application of this emergent research varies in history departments and in large lecture survey courses. This study addresses the gap in research about effective modes for introducing disciplinary thinking in a large lecture history course through the means of the threshold concepts framework. This dissertation contributes to three areas of research in higher education: application of threshold concepts at the course level; what this application looks like in terms of practices at the discussion section level; and the role of the teaching assistant in his or her own development in teaching history and within the discipline.

This study looked at how threshold concepts were introduced in a large lecture history course. The analytical framework for viewing the results provided a lens to look at how the concepts were introduced and carried throughout the course. This framework, shaped by the situated learning and threshold concepts literature, looked at the “careers” of the concepts and how they were woven through a large learning system from professor to TAs to students.

In order for the careers of the concepts to carry through the course, certain teaching capabilities need to be in place to ensure the concepts reach students. The methods used to determine the uptake of concepts in the TA discussion sections were classroom observations, online surveys and interviews. Results show that teaching assistants are a crucial link for the careers of the concepts within a large lecture course. Moreover, teaching assistants' orientation to threshold concepts contribute to an explicit emphasis on the disciplinary concepts within their own work as disciplinarians and researchers. Tracing the careers of these concepts yielded more information about what is needed within the large course system in terms of the types of processes that need to be in place to support the inclusion of the concepts in the course. Threshold concepts afford faculty an opportunity to rethink the goals and principles that drive their course. Translation and framing of these concepts represented the threshold capabilities needed on the part of the teachers (both the professor and TAs) to support the movement of concepts from professor to students. The historical thinking strategies, such as analyzing primary sources, represented the particular threshold actions needed to support students in moving through thresholds to the discipline. While this is a baseline qualitative study of one large lecture course at UCSB, implications of this work contribute to graduate student teaching development and threshold concept course design.

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CHAPTER 1 INTRODUCTION

Research in teaching and learning in higher education in the last fifteen years addresses the importance of integrating disciplinary ways of thinking – i.e. an understanding of the ways that questions are asked and investigated within disciplines, the ways and practices that evidence is used, the ways that findings are represented -- in undergraduate courses. However, the application of this emergent research varies in history departments and in large lecture survey courses. This study addresses the gap in research about effective modes for introducing disciplinary thinking in a large lecture history course. A baseline qualitative study of one large lecture course at UCSB, this dissertation contributes to three areas of research in higher education: application of threshold concepts at the course level; what this application looks like in terms of practices at the discussion section level; and the role of the teaching assistant in his or her own development in teaching history and within the discipline.

How much do students learn about a discipline in a large lecture survey course? How to combat the initial perception of a large course as “just” a requirement rather than as a threshold to a discipline and the thinking entailed in that discipline? This is a question that arises often in American colleges and universities when thinking about important disciplinary concepts. This question also poses challenges to the nature of a survey course. Writing in the American Historical Association (AHA) journal, historian Lendol Calder (2006) commented that “we should be designing classroom environments that expose the very things hidden away by traditional survey instruction: ... the inquiries, arguments, assumptions, and points of view that make knowledge what it is for practitioners of [any] discipline” (p. 1363). In talking about his own discipline and the subject of this research, Calder argued for the US

History survey course to expose students to “the linchpin ideas of historical inquiry that are not obvious or easily comprehended” and “the cognitive contours of history as an epistemological domain” (p. 1363). Calder proposed inviting students in history survey courses to think like historians –and the active implementation of what that entails—as a mode for meaningful learning.

How can faculty engage students into “epistemological domains” in traditional survey courses without scaring them away? To answer this question, the threshold concept framework has been widely adopted in higher education as a vehicle for discussing key disciplinary ways of practice. Erik Meyer and Ray Land developed the framework based on multiple professional development projects at the Durham University, UK between 2001-2005. Land et al. (2014) recently estimated over 170 empirical studies of threshold concepts now constitute a legitimate research base for this framework. Threshold concepts outline important concepts within a discipline that are essential to becoming a member in that discipline. More specifically, threshold concepts “represent how people ‘think’ in a particular discipline, or how they perceive, apprehend, or experience particular phenomena within that discipline (or more generally)” (Meyer & Land, 2003). Meyer and Land suggest that threshold concepts hold particular characteristics. They are initially troublesome and counterintuitive, connoting an intellectual struggle; they are bounded within the discipline; they are reconstitutive in the sense that their meaning changes as one acquires more knowledge; they are discursive in that learning the concept involves social interaction; they are transformative or irreversible in that one can not look at an event in history in the same way again; and they are finally integrative in the sense of building on prior knowledge and

experience to form new conceptual understandings. Together these characteristics connote deep learning while developing an identity as a practitioner of that discipline.

The threshold concept framework provides a heuristic for faculty to uncover central concepts in a discipline in order to identify, acknowledge, and study how they might be taught within higher education (Perkins, 2006). The potential to reframe the standard survey course in this way yields benefits for faculty, graduate students, and students. For students, an intentionally designed course that balances an introduction to the discipline as a context in which to view course content offers a high impact learning experience. The threshold concepts framework introduces students to a disciplinary set of practices and strategies that might change the way faculty, and teaching assistants think about the course *and* the discipline. How to engineer this shift in perception of the utility of a large lecture course as a gateway to a discipline is important to consider because of the sheer numbers of students involved. Consider the challenges of a large lecture environment. Carbone and Greenberg (1998) surveyed faculty and students at the University of Maryland to understand perceptions towards large lecture courses. Their findings indicated that both faculty and students perceived the large course as an impersonal space. Faculty felt students approached the course without a sense of accountability to participate in the course. Students felt the teachers provided no motivation to learn or to vary their approaches to teaching.

This is where the threshold concepts lens on the teaching process offers an opportunity, for the faculty member, to reflect on alternative ways to present content for students. Any discussion for faculty around disciplinary concepts functions as its own threshold into discussion about teaching and learning leading to important questions about what disciplinary practitioners know and how this knowledge is validated (Entwistle et al.,

2002). Such discussions generate opportunities for faculty to share ideas, concerns, challenges related to teaching and student learning. The framework offers faculty alternatives approaches to course design, “attend[ing] to what critical disciplinary concepts and ways of thinking look like from the students’ experience and provide a bridge between the teacher’s (expert practitioner) and the students’ (novice learners) experience” (Bain and Bass, 2011, p. 199). While discussions at the disciplinary level are important for curricular innovation, how this framework applies at the course level requires more attention. If faculty bridge their disciplinary knowledge to the student experience, the threshold concept approach affords the potential to help students participate in historical practices in course discussions and assignments. The question, then, is how can students learn to recognize these expert practices and begin to apply them within the constraints of large lecture course?

This is where the teaching assistant roles matters most within a large lecture course. While the professor of a large course operates at the structural level of the course system, the teaching assistant operates at the student level serving as a critical link between the overall pedagogical framework for the course and facilitating students’ understanding of this framework. Threshold concepts orient TAs towards fundamental disciplinary concepts for their own work and in teaching these concepts to students. However, important questions around identity surface when looking at the teaching assistants’ role within the history course as teachers and as emerging disciplinarians.

Despite the relevance of applying threshold concept framework at the course level for faculty, graduate students, and students, though, relatively little work has been done on threshold concepts within humanities disciplines, or on the use of the threshold concept framework in large lecture courses. In *Threshold Concepts in the Disciplines* (Meyer and

Land, 2008), one of the three edited collections focusing on examination of threshold concepts within disciplines, nine disciplinary context chapters concern the application of threshold concepts in the sciences or social sciences while only two are about art and language learning. One discipline in particular that has not been addressed extensively using the threshold concepts framework is the focus of this dissertation: history. Only a few researchers have examined threshold concepts and their operationalization within history courses. For example, Anderson and Day (2005), as part of a larger research project on threshold concepts in the UK, compared modules (analyzing primary sources) used in first year and senior year history courses. Their research aimed to determine best course design practices that support students in engaging in disciplinary “ways of thinking and practicing (WTP),” their term for how practitioners think and practice within a domain.

The threshold concept framework formed the impetus for the Decoding the Disciplines (DtD) process developed by historian David Pace and faculty development consultant Joan Middendorf (2004), a project that initially focused on learning in history; however, they do not point to threshold concepts explicitly beyond their initial efforts. Instead, the DtD project concentrated on determining which disciplinary concepts in history gave students the most trouble. Middendorf and Pace interviewed nineteen members of the history department to find commonalities and differences concerning historical concepts and how their students grapple with those concepts. Their work resulted in the development of a rubric for the history program where students practice the following four skills across their undergraduate career: recognize, interpret, evaluate, create (Diaz, p. 1222). Their framework recalibrated the process of attending to essential concepts of the discipline by looking at the places where students consistently get “stuck” or struggle within history courses. While

Anderson and Day and Pace and Middendorf have extended work beyond the threshold concepts framework, neither project has examined this type of work in large lecture courses.

While threshold concepts have been explored in provocative ways outside of history, the need exists to explore how the threshold concept framework functions in large lecture history courses at three levels of people involved in the system: the professor, teaching assistant, and student level. The focus of this investigation centers on a college level history course at a large research university. Two quarters of this course were studied in 2013 and 2014. John Majewski, a professor of history who has taught the course since 1995, decided to make certain aspects of what historians do -- threshold concepts in history -- explicit to students in his class. The course was a ten-week survey of U.S. history between 1860-1890. In addition to Majewski, there are nine teaching assistants, each responsible for three discussion sections. The characteristics of threshold concepts in history as troublesome, discursive, transformative, and integrative offered Professor Majewski tools to design his course differently by introducing students to these concepts. In the 2013 version of the course, he incorporated seven mini-lectures—each focused on a particular historical thinking skill – to complement certain lectures in his syllabus. The lectures addressed what historians do; how historians argue; how historians write thesis statements; and how historians practice historical empathy, the habit of looking at the past through current social mores, trends, or policies. For Majewski, these lectures constituted key threshold concepts in his view. He tried to align the specific threshold concept in history lectures to the content being taught that day in order to align a method along with pertinent content.

Following this initial course redesign embedding threshold concepts in the course, Majewski realized that an important element of the large lecture course system resides in the

role of the teaching assistant. In 2014, the second version of the course with threshold concepts embedded, not only did Majewski reconsider his course in light of the concepts students needed to develop, he also considered what the TAs needed in terms of their own understanding of the threshold concepts in order to facilitate the learning of the concepts in their discussion sections.

While the threshold concept framework offers potential to rethink the learning context wherein students acquire and utilize key ideas from the field, little work has been done to date as to what this looks like within large lecture courses in higher education. Literature on teaching and learning within large lecture courses primarily focuses on issues of engagement and leveraging technology to manage the learning experience among hundreds of students.

This study provides a baseline for looking at the integration of the threshold concept framework as a mode for learning for both students and graduate students. This dissertation serves two purposes: to investigate methods for incorporating threshold concepts and historical thinking skills in large lecture courses and to look at the role that teaching assistants play in this incorporation; and to observe how this implementation might affect student learning (in a limited way). To do so, I investigated four main research questions:

1. What are the effects of the inclusion of historical thinking into a large lecture course?
2. How does the professor define the threshold concepts to include in his course?
3. How do teaching assistants incorporate these concepts into their own discussion sections?
4. Based on the intervention of the professor and TAs, what are the initial effects on students in the course on the inclusion of threshold concepts?

To answer these questions, the study traced the careers of the concepts through the course based on their interpretation by the professor, the teaching assistants, and in limited

examples, the students. The points where concepts surfaced in the course showed where these participants made them explicit, giving life to the concepts beyond the professor's historical thinking lectures. The life of the concept, or its viability to move through a large system, can be described as its "career" according to Etienne Wenger (2010). This metaphor shaped the way the trajectory of the threshold concepts will be examined within the course.

In this introduction, I explain the setting for my research. The literature review in chapter two is divided into five sections outlining the conceptual context of this work. The first section outlines expertise studies that foreground the need to connect disciplinary, tacit practices explicit to students for engagement with the discipline. The second section looks at situated learning principles that address the acquisition of expertise and what it looks like within large organizations. The third section shifts to looking at research on expertise in history and how threshold concepts parallel this research. The chapter ends looking at threshold concepts studies within higher education, particularly within the realm of large course systems. Chapter three outlines the context, participants, data, and the analytical framework used in understanding how threshold concepts surfaced within the large course. Chapter four presents the analysis of data in three parts: 1) four case studies of the most salient historical thinking concepts in the 2013 version of the course; 2) the 2013 participant interviews reflecting on those concepts and the practices that supported their dissemination; and 3) one case study from the 2014 version of the course. Chapter five discusses the important themes emerging from my analysis: how the concepts moved through the large course system, the issue of identity and experience of the TAs, and the evolution of the professor's process for making concepts explicit within his course. Chapter six outlines potential implications and further questions stemming from this study.

CHAPTER 2 LITERATURE REVIEW

The central focus of this dissertation is how a pedagogical emphasis on threshold concepts of history, also referred to here in total as “historical thinking skills,” had an impact on the course for the faculty member, the teaching assistants, and a handful of the students in the course.

Before the methodology and findings of the study are presented, the literature review outlines the conceptual framework for my research. Since my study explores the operationalization of the threshold concept framework in a large lecture setting, the intellectual background of the framework consists of three main areas of research: understanding expertise, situated learning (the environments in which expertise is learned/cultivated), and what the study of expertise and situated learning looks like at the disciplinary level (history) and the course level. Acquiring expertise involves accumulating knowledge and developing habits of mind. Studies show that experts possess large amounts of knowledge and they have particular strategies for accessing, ordering, and representing that knowledge (Bransford et. al, 1999; Chi, 2011). Experts also participate in a continual discourse about their practice (Wenger, 1998; Bransford & Schwartz, 2009). This type of participation and exposition of practice lead to an expertise that aligns with a professional identity (Meyer and Land, 2001). Together, these individual frameworks of expertise, situated learning, and threshold concepts form the basis of this research project in an undergraduate, large lecture history course.

Understanding expertise

The focus of this investigation centers on a college level history course at a large research university. John Majewski, professor of history who has taught the course since 1995, decided to make certain aspects of what historians do, or threshold concepts in history, explicit to students in his class. To this end, he designed and delivered seven mini-lectures focusing on historical thinking skills. This pedagogical intervention represented his goal for students to understand disciplinary practices in order for students to enact those practices in their own work either through course discussions or paper assignments.

These historical thinking lectures represented an attempt to make expert thinking more explicit and visible for novice learners. Engaging in this kind of work in a history course is not new; many education and cognitive psychology researchers have documented what historical thinking looks like based on studies of how experienced historians engage in disciplinary practice. Studies supporting this type of research extend from expertise research that spans 70 years of observing experts performing routine tasks associated with a particular domain (Chi, 2011). Breaking down such tasks gives researchers a clearer idea of strategies, processes, and knowledge used by experts.

Education researchers look at the ways in which expertise is gained and applied for the same purpose. Thinking processes and habits that become tacit among experts, such as teachers and professors, result in a knowledge gap among novices, or students, entering a course. At times, the disciplinary expectations of the professor appear far removed from the disciplinary abilities of a novice student. Understanding what experts do with their extensive knowledge provides professors with opportunities to make strategies such as reading primary sources and constructing arguments (within the context of the disciplines in which they are expert) more accessible to students (Bransford, et. al, 1999). While the study of expertise

began with the simple classification of expert strategies and how expert knowledge is structured (de Groot, 1965; Chase and Simon, 1973; Dreyfus & Dreyfus, 1986; Chi, 1988; Ericsson, 1991), the research has led to significant investigations into how one develops expertise (Lave, 1991; Lave & Wenger, 1999) as well as how to apply this expertise research to education (Alexander, 1993; Collins et al., 1999).

Characteristics of expertise. Expertise studies extend back to mid-20th century when a Dutch psychologist, using a think aloud methodology, studied chess masters explicating their thoughts on strategies, reasoning for particular moves, and representing the potential consequences of those moves during a game. deGroot (1965) learned that expert chess players possessed complex problem-solving strategies and reasoning skills. Since then studies of expertise have been conducted in many more domains such as mathematics (Schoenfeld, 1985), music (Ericsson, 1996), physics (Chi, Feltovich, Glaser, 1981), and literacy studies (Scardamalia & Bereiter, 1991). At a very general level, expertise entails accumulating knowledge and knowing how to use that knowledge effectively. Expertise also entails questioning what is not known when faced with a challenging conundrum; having the persistence and mental capacity to work within a conundrum are also qualities of experts. Micheline Chi, a prominent expertise researcher in multiple domains and expert chronicler of this research, has identified two categories in which research on expertise can be placed: 1) the absolute approach, focusing on studying masters practicing their craft (as in the chess example from mid 20th century) and 2) the relative approach, the study of experts in relation to novices within a given domain (Chi, 2006). This latter approach forms the basis of the literature relevant to this project. Studying the efforts stemming from the relative approach to expertise provides additional context to the instructional setting of this study. This

approach is important for two reasons in the context of this research: 1) it assumes that aspects of expertise can be achieved by novices to some degree, and 2) it implies that there is a range of knowledge and practices to be learned. This range could contain multiple processes that could be developed, or fine-tuned by students in a class. Expertise will not be achieved within a particular timeframe such as a semester or quarter but students could approximate these practices.

Both the absolute and relative approaches to the study of expertise provide insight into what we know about how experts think and how experts differ from novices. From this collective body of work, it is possible to identify an established set of characteristics associated with expertise (Ericsson, 1996; Chi, Glaser, & Farr, 1988; Chi, 2011; Bransford et al., 2001; Lajoie, 2003). First, the more expert one is, the more that the knowledge associated with expertise becomes tacit. Tacit knowledge refers to knowledge, processes, and strategies that become second nature to an expert when solving a problem. As expertise develops, in other words, the processes and strategies recede as they become ingrained in the expert's practice. Donald Schon (1983) explained that when experts "try to describe [what we know or how we know it] we find ourselves at a loss, or we produce descriptions that are obviously inappropriate. Our knowing is ordinarily tacit, implicit in our patterns of action and in our feel for the stuff with which we are dealing. It seems right to say that our knowing is *in* our actions" (p. 49). Additionally, these studies contend that experts' knowledge becomes tacit over time. Revealing how an expert approaches a problem or task within any discipline or domain reveals how their knowledge is structured, how they use that knowledge, and the paths they take to solve a problem.

A second characteristic of expertise identified by researchers working within this relative approach involves understanding how experts utilize this vast amount of knowledge. Experts possess particular ways of structuring that knowledge. Structured knowledge within expertise means that not only do experts possess extensive amounts of knowledge, they are able to retrieve it and order it in a way that makes sense to the given situation or problem at hand (Chi 2011). Because experts structure their own knowledge they are then able to create meaningful representations of the task at hand that include understanding the components of the task, retrieving appropriate knowledge to solve the task, and developing a roadmap for solving the task. In the context of history, this ability to create meaningful representations is connected to contextualization (Wineburg, 1991). The historian must read each text and situate the texts within a broader chronology or broader theme. Bransford et al. (2001) provided further ideas about what experts do with knowledge in relation to novices in that they 1) notice features and meaningful patterns of information; 2) their knowledge reflects contexts of applicability; 3) they hold flexibility in retrieval of information and usage of knowledge (p. 31). These features represent the expert as a nimble, flexible thinker.

Related to the idea of flexibility with knowledge, is a third characteristic that addresses the adaptability of experts from domain to domain. It is known that experts possess content knowledge and more sophisticated problem-solving strategies, but they also know how to be “effective” learners in the evolution of their expertise – expertise begets further expertise. An effective “expert” learner means that “one must reflect and self-explain the concepts or conditions of a rule, much like one must reflect and self-explain while solving a problem or practicing a skill in order to maximize learning” (Chi, 2011, p. 32). From the educational research perspective, Lajoie contends that this characteristic of

expertise involves having sophisticated interpretation and application skills that vary from problem to problem. “The most important lesson of expertise research, especially in real-world domains, is that there are multiple solution paths, and clusters of processes to achieve a solution” (p. 24). The ability to self-regulate learning and apply new knowledge consistently to new situations or problems is an important characteristic.

Within those paths and clusters of processes reside disciplinary models and examples for students to interact within the span of a course. In the specific history course in this study, the professor framed the content of the course as being a set of “contested narratives.” In his opening lecture in 2013, Professor Majewski explained this concept to students, saying that, “what makes history exciting, interesting is that the narratives are contested ... that historians disagree about narratives all the time, especially their interpretation and their meaning” (McGowan, recorded audio lecture, 2013). What is in question here is if students are introduced to what experts do within a discipline in a large lecture course, what strategies, processes, or thinking will be most accessible to them? The other question is how are those strategies, processes, and thinking reinforced by the TA in the discussion sections. While students will not become experts within the span of ten weeks, consistent exposure to the ways of thinking and practicing in a discipline provide tools for working with knowledge.

Tacit knowledge, knowledge structures and representation, and flexible uses of knowledge in problem-solving are important characteristics of expertise identified in the literature on relative approaches to the study of expertise to consider for the context of this study. The professor set out to make certain threshold concepts in history explicit to students in the mini-lectures, demonstrating his attention to the idea that these concepts are associated with expertise, but might be tacit. He emphasized the use of historical texts as evidence that

must be analyzed in order to structure written arguments. His explication of historians' arguments and contested views of events demonstrated the use of historical thinking to arrive at various interpretations, thereby reinforcing the notion of multiple solution paths. Creating various interpretations for students demonstrated how they could use, apply, or manipulate evidence to support an argument. The explication of historical practices and historical knowledge was a cornerstone of the course.

An overview of situated learning literature in the acquisition of expertise

The acquisition of expertise involves more than learning how to replicate structures of knowledge and representations of problems. Lajoie argues it also requires “determin[ing] what experts know and ... how to help novices acquire similar competencies” (Lajoie, 2003, p.21). The subject of this study is the professor's goal to make historical thinking explicit to students and teach some of these aspects of expertise in order to orient the students to the discipline, an important first step in acquiring disciplinary competency. The challenges, opportunities, and efficacy of how to do this within a large course system constitute one of the central questions of this study.

A number of researchers have focused on how expertise is acquired in particular learning situations. Jean Lave, a social anthropologist, observed apprenticeship contexts in multiple settings and domains. Lave argued that learning is not distinct from the context or culture in which it happens (Lave, 1988). Becoming a “participant in the world” involves a learning trajectory from a novice perspective towards mastering skills within a particular domain. Within Lave's (1996) own research in applying her notion of situated learning to education, she describes the idea of *telos*, “direction of movement or change in learning,” to suggest the movement a novice makes towards expertise. Lave argued the idea of *telos*

implies that learning is a continual, participatory practice developed in relation to others or in part as a result of explicitly discussing one's practice with others. This idea of constructing "identities of practice" reinforces the idea of expertise as one where an expert is constantly learning or motivated to learn within a situated space. For Lave, this means an expert is an "embodied exemplar," or someone who understands and has reflected on how their identity developed through continual practice (Lave, 1996). Possessing this awareness of identity development could indicate the expert's ability to teach others or create that bridge between expert practice and novice naïveté: reflecting on what ways of knowing look like in their discipline and own practice; designing and implementing these ways of knowing in their teaching practice, and examining how these ways of knowing surface in student work.

The notion of embodiment within a community of practice has roots in the theory of situated learning developed by Lave and Swiss computer scientist Etienne Wenger, who refer to this theory as "legitimate peripheral participation" (Lave and Wenger, 1998). This theory posits a definition of participation in any context as "as a way of learning--of both absorbing and being absorbed in--the 'culture of practice'" (p. 21). The notion of legitimate peripheral participation suggests that the novice learner initially starts at the periphery of a community but as she becomes a more active member within the community, eventually the novice learns how to learn about and comes to participate in practices that enable her to move into the role of expert. Lave and Wenger noted that "[v]arious forms of apprenticeship seemed to capture very well our interest in learning in situated ways – in the transformative possibilities of being and becoming complex full cultural-historical participants in the world – and it would be difficult to think of a more apt range of social practices for this purpose" (Lave and Wenger, 1991, p. 32). The theory of participation here, and in Lave's earlier work,

constitutes social practices; becoming a participant requires learning from experts as well as peers.

The notion of practice – identity-development, deliberate, discursive – plays out in Lave and Wenger’s later work on communities of practice. A community of practice is a group of individuals working together on a task through discussion, sharing of ideas, and collaboration. Lave and Wenger argued that the notion of a “community of practice” (Lave and Wenger, 1998) applies to educational environments as well – learning from each other; sharing experiences; and working on ideas and concerns. Watching experts help initiate novices involves the formation of a community in discussing, sharing, helping, and utilizing strategies and techniques.

How else can experts help initiate novices within a community of practice? Promoting the idea of situated learning further, researchers connected Lave’s work on apprenticeships and Lave’s and Wenger’s work on communities of practice to the possibility of apprenticeships in classroom environments. John Seely Brown is one of the most notable researchers working with situated learning and cognition. In 1989, he, along with Allan Collins and Paul Duguid, published “Situated Learning and a Culture of Learning” wherein they argued that conceptual tools, authentic activity, and enculturation function as integral parts of the learning process if one is to develop expertise in a domain. In the authors’ view, the traditional notion of separating knowledge from applying such knowledge was no longer valid. Using an example of how students learn new vocabulary words, they argue that learning words is part of the act of communications. Learning vocabulary words from a dictionary alone does not suffice. Situating these words within specific contexts, they argued, was critical: “a concept ... will continually evolve with each new occasion of use, because

new situations, negotiations, and activities inevitably recast it in a new, more densely textured formso a concept, like the meaning of a word, is always under construction ... part of [its] meaning is always inherited from the context of use” (33). The authors describe conceptual knowledge as tools that are used when a community of practice is engaged in an authentic activity germane to that community. In discussing communities of practice, the authors point to the use of conceptual tools as bound by an “intricate, socially constructed web of belief” that is integral to practice. They also claim that students should not be expected to become professional practitioners but that it is important for students to have a complete understanding of how tools are used in authentic situations. In part, students need to see these socially constructed webs of knowledge in order to understand authentic activity of practitioners and to initiate the process of entering into their world. Brown, Collins, and Duguid describe this as, “essential to understanding what [people] do” (33).

One of the important ideas stemming from this article is the notion of concepts gaining “texture” as they are deployed in different situations. In the context of language learning, the authors describe an authentic activity as one with two phases: the first phase is the categorization of a word (what is it?) and the second phase is the continual use of that word in phrases and conversation (how is it used?). What at first is an unknown concept only gains meaning through continual use and application, both hearing it used by native speakers and using it oneself; the “texture” added comes from the learner’s reflection, application, and integration of the concept into their own understanding (Brown, Collins, & Duguid, p. 36). Furthermore, the authors describe adding texture as a continual process and one without an ending because of the multiple permutations the concept takes on as it is being used in different contexts. The concept of building texture around one’s application and integration

of a concept is useful to consider in light of the discipline in this study for two reasons. First, history has been described as having an “inherent paradox” (Collingwood, 1946; Wineburg, 1991). It is a discipline void of right answers because the past is unknowable and only the interpretation of evidence from past events is what scholars actually know. Second, there is a need for authentic activities in the classroom that enculturate students to use the required conceptual tools in the discipline. Bringing the idea of “texture” and tools to this paradox in history empowers students to engage with course material knowing that they need to bring their own interpretative tools to the table in order to analyze the prior interpretation of a concept; and it enables students to build a new understanding—or layer of texture—to their comprehension of the material.

In order to enculturate students into a discipline, Brown and a different set of colleagues (Allan Collins and Susan Newman) suggested a way to create authentic activities leading to enculturation called “cognitive apprenticeship.” “Our term, cognitive apprenticeship,” they wrote, “refers to the focus of the learning through guided experience on cognitive and metacognitive processes, rather than physical, skills and processes” (p. 457). This is a framework for both teaching and learning based on the traditional notions of apprenticeship observed in Lave’s studies (1988) where the expert (or teacher) transfers knowledge to the novice (or student) adapted for educational settings. Just as Jean Lave documented the type of interaction within apprenticeship settings, Brown et al. emphasize the sociocultural nature of learning in this framework. Interaction between experts and novices within a community of practice involves modeling, participation, discussion, and application of concepts in order to support and enhance learning.

Cognitive apprenticeship methods encompass strategies for designing learning environments that foster the development of disciplinary ways of thinking. Following their study on incorporating ways of thinking and practicing in history courses, Anderson and Day (2005) suggested future courses should “provide students with more detailed discipline-nested guidance about tackling specific academic tasks; e.g. by indicating more fully what are productive ways of going about reading, essay writing, seminar presentations or handling documents” (p. 51). This suggested revision points to the need to situate the learning environment – assessment, activities, and projects – within the discipline in order to have an impact on student learning. The cognitive apprenticeship methods outline the necessary support structures needed to assist in the learning process such as modeling (making the tacit explicit), coaching (implying individual moments of feedback when needed), and scaffolding tasks appropriately to allow students to add “texture” to their developing interpretations.

Situated learning theory provides a perspective from which to think about how and where in the design of a course one professor is able to design activities or settings in which students move along a trajectory towards learning, a question of particular relevance for this study. The situated learning literature demonstrates the need to connect characteristics of expertise with authentic contexts in which to enact and practice these qualities of expertise. One limitation with thinking about expertise is to what extent one faculty member could “move” students (in this case ~450 students) along that trajectory within the boundary of a quarter. But while there are certainly limitations to the extent to which students can access characteristics of “expertise” in a course, Bain and Bass (2012) entertain the possibility of designing assessments to promote the enculturation of novices into expert practices. These assignments could prompt students, they said, “to approximate expert thinking -- albeit, of

course, not at expert levels of performance” (p. 198). In effect, Bain and Bass argue for creating authentic assessments. Brown, Collins, and Duguid (1989) also noted the unrealistic expectation of a student becoming a professional within a course. They emphasize instead that exposure to how an expert “looks at the world and solves emergent problems” reveals more information than a textbook or lecture ever could. Immersion in disciplinary practices that approximate the discursive practices and participation found among experts provides key ideas to structure learning environments that situate students in a disciplinary community of practice.

Brown and Duguid (2000) explored these formations of community by studying large organizations to see how information is disseminated through them. Extending the situated learning literature to more recent reflections on situated learning within organizations, Brown and Duguid examine what they call the social life of information: how information moves through large organizations. While their research is geared towards organizational management and businesses, they connect Wenger’s concept of communities of practice to businesses and higher education. In order to trace the movement of information, they suggest looking at the practices enacted by people within an organization in addition to the processes put in place within the system. To illustrate what this looks like within a business, they reference a company that makes photocopy machines. The company trains repair technicians through a strategically designed training program and the company provides technicians with detailed manuals. When the technicians went into the field, though, suddenly the tasks were not easily answered through the manual or through the steps taught in training. The capability to learn how to address tasks came through informal lunch conversations where the technicians discussed what they faced on the job and shared strategies for solving

problems, “they posed questions, raised problems, offered solutions, constructed answers, and discussed changes in their work, the machines, or customer relations. In this way, both directly and indirectly, they kept one another up to date with what they knew, what they learned, and what they did” (p. 102). Despite the support and training system provided by the company, the technicians’ practices emerged from their collective experiences and problem-solving strategies. Brown and Duguid assert that the strategies produced within a system should inform the training processes of the system. Their argument contends that understanding practices, and how they travel among people in the system, informs the larger system structure at work. To look at how information travels, “requires looking not simply from knowledge to information but from knowledge to practice and groups of practitioners” (p. 120). If an organization – in their example, a company -- understands the relationship among structure, practices, and people, then the structure can be organized in a way to leverage this relationship to produce a positive outcome.

The same logic can be transferred to higher education, as “practice both shapes and supports learning” (p. 129) in order to transform the process of teaching and learning. Their final chapter analyzes the current state of higher education. Brown and Duguid discuss the level of change necessary at the higher education level and the pressures on universities to respond to growing demands, scale, and money. The change required in their view is to adopt the principles of situated learning so that knowledge delivery focuses more on enculturation to knowledge and expert practices rather than focusing on delivering and receiving information. They explain:

Envisioned change will not happen ... until people look beyond the simplicities of information and individuals to the complexities of learning, knowledge, judgment, communities, organizations, and institutions. That way, it seems more likely that change will reorganize the higher education system (p. 213).

The type of change described here acknowledges the dynamic nature of situated learning and its complexities when applied to organizations – similar to the dynamic nature of a large lecture course and how information moves within it. On the surface, the professor in this study incorporated additional lectures on historical thinking. However, when this shift in the system occurred, the complex nature of the system revealed variance in how information made its way to students. The TAs were one area of the system that made the original change more complex than it seemed. One area of higher education where Brown and Duguid feel enculturation occurs is in graduate education where students are apprenticed into the profession. No longer are students learning about a discipline, they are learning to be active practitioners. In this study, the TAs were becoming active practitioners in their own research but also in the teaching realm.

Brown and Duguid questioned how information travels within organizations and looked at the particular practices within them. Wenger’s notion of the “career” of a concept within communities of practice provides a more refined perspective from which to consider this idea of how information or concepts are interpreted, adopted, adapted, and implemented within various organizations from businesses to schools. Thinking of a concept as having a *career* -- a concept which progresses continuously in any environment --- applied is central for the study at hand. The career of a concept, such as a threshold concept, also changes and adapts as it passes from the professor, to the graduate student, to the student, in a learning system. Wenger defines a system as one that “arises out of learning. [I]t exhibits many characteristics of systems more generally: an emergent structure, complex relationships, self-organization, dynamic boundaries, ongoing negotiation of identity and cultural meaning, to mention a few” (p. 179). These elements of a system and the processes inherent in large

systems lend themselves to understanding how concepts, such as threshold concepts, will make their way from professor to student and what happens along the way. Thinking of concepts and their “careers” holds merit in considering about fundamental concepts, such as threshold concepts, and their ability to travel through multiple interpretations, processes, and practices of one history course. The next section of the literature focuses on the study of expertise in history followed by literature describing situated contexts for teaching historical thinking skills at the course level.

Research on expertise in history

Beginning in the late 1980s, cognitive psychologists and educational researchers such as Sam Wineburg and others began to apply expertise research to history. Researchers cited history as a “marvelous location” (Leinhardt, Stainton, and Virji, 1994) to study because of its inherent learning paradox: it is impossible to ever really know what happened in the past, therefore historians rely on powers of investigation, investigation, and inquiry (Hallden, 1994). R.G. Collingwood (1946), a philosopher and historian, originally referred to these powers as driven by imagination:

Historical thinking is that activity of the imagination by which we endeavour to provide [an] innate idea with detailed content. And this we do by using the present as evidence for its own past. Every present has a past of its own, and any imaginative reconstruction of the past aims at reconstructing the past of this present, the present in which the act of imagination is going on, as here and now perceived (p. 247).

The philosophical view of what is entailed in constructing history poses an intriguing pedagogical challenge. Historians might ruminate on what constitutes thinking imaginatively about history, but those who teach history are left with a bigger challenge to deconstruct what

the historical imagination means for students at all levels. This brings to mind the question of how students could work within such uncertainty in a discipline commonly perceived as being made up of facts, dates, and people. VanSledright (2008) claims that “[I]ay people seldom appreciate the idea that historical narratives are constructed from evidence that has been questioned, pieced together, and interpreted” (p. 21). Collingwood, cognitive psychologists and educational researchers have deconstructed what constitutes an historical imagination while developing definitions of what history is through think-alouds with experts, students (novices), and expert teachers.

Professor Majewski, the professor (and expert teacher) whose course is the focus of this dissertation, voiced an initial concern prior to the start of his course about introducing historical thinking lectures in his course. In discussing the various concepts in history he wanted to focus on, he wondered to what extent he was teaching U.S. history versus teaching a graduate-level historiography course where students learn what history is and how historians practice their craft. The nature of this tension, uncovering the inner workings of a discipline versus the specific details of an historical event, is a focus of the work of Gaea Leinhardt. Leinhardt contributed extensively to the research on historical thinking, particularly in the realm of teaching, learning, and writing in the discipline based on studies of high school teachers and academics (Leinhardt, Stainton, Beck, 1994b; Leinhardt & Young, 1996). Her research explored the “tension between the higher level, more intensive professional practice of a subject and the society's desire for its children to learn something about it” (p. 81). In an effort to examine ways and thinking practices in history, Leinhardt, Stainton, and Virji (1994a) examined two history teachers’ first week of an Advanced Placement US History course in a local high school juxtaposing their explanations of what

history is with data from interviews with seven academics who defined history using concept maps (p. 81). Leinhardt and her colleagues wanted to understand how each group defined the study of history to identify the bridge between definitions formed by postsecondary historians how the discipline is introduced and taught in secondary schools. Her study specifically addresses the question of how historians conceive of the discipline and how high school teachers introduce students to historical study. She acknowledges the fact that both groups share the work of teachers and historians but she draws an important distinction between them that influences their work. The distinction Leinhardt draws here is in the focus or audience of each group. The high school teachers focus on certain aspects of history in order to help “their students understand and perform in history rather than how they can contribute to the discipline” (p. 87). The professional historians, for the most part, focus on “their research and their place in the scholarly community” (p. 88). Regardless of the focus, Leinhardt collected data from observing high school teachers and interviews with historians to produce this definition of what history is: “... a process of constructing, reconstructing, and interpreting past events, ideas, and institutions from surviving or inferential evidence to understand and make meaningful who and what we are today... The process also involves constructing coherent, powerful narratives that describe and interpret the events, as well as skillful analyses of quantitative and qualitative information from a theoretical perspective” (p. 88).

Leinhardt and colleagues found that defining the study of history to this degree helps teachers construct ways to introduce students to the complex, counterintuitive, and uncertain nature of studying history. Based on Leinhardt’s research, the high school teachers in her study who took the time to explain the epistemology of the discipline—how historians do

what they do— inhibited students from forming a simplistic definition of history to recognizing the nuanced forms of thinking that helped them progress in the course (p. 87). Revealing the epistemology of the discipline represents a vehicle for student engagement and a pathway towards progression in a course. These findings connect to Professor Majewski’s rationale for taking the time to introduce historical thinking lectures in his course.

Cognitive psychologist Sam Wineburg, a contemporary of Leinhardt and one of the most prominent researchers on historical thinking, examined expert practices of historical thinking within two prominent studies of historians. Just as Leinhardt conducted a wide range of studies regarding expertise in history, Wineburg explored the multitude of factors that could account for the differences between experts and high schools students. Based on his findings, he argued that high school students “can know a lot of history but still have little idea of how historical knowledge is structured” (p. 84). Because of this, Wineburg asserted, it is important to know what high school students bring into the college history class and the (mis)conceptions they might have towards the discipline in order to help them progress through the course as Leinhardt et al. contends in the prior study. Wineburg’s first article (1991), “Historical problem-solving: a study of the cognitive processes used in the evaluation of documentary and pictorial evidence,” compared the primary source reading practices between eight professional historians and eight high school seniors. In the study, each group received a set of primary source documents and paintings related to the Battle of Lexington during the Revolutionary War. Wineburg found that historians used certain heuristics repeatedly while reading primary sources while students (as novices) did so less frequently.

These heuristics or specific strategies that Wineburg isolated among the historians’ think-alouds possess important clues for enacting historical thinking. The strategies include

sourcing, contextualization, and corroboration. “Sourcing” refers to the act of reading the footnotes first in order to place the text within an academic provenance. The source of the text provides important clues to the document. Wineburg found that “by knowing a document’s author and the place and date of its creation, the historian could develop hypotheses about what would be in the body of the document, the stance it might take, and its truthfulness or accuracy” (p. 79). Corroboration refers to the act of substantiating information before establishing the likelihood of an event. Wineburg describes this process as doing a “lookback” or the number of times a student or historian looked back to the other documents to check details. Contextualization refers to the process of putting all the documents together in space and time. Based on the historians’ think-alouds, this process involves “reconstructing historical events” (p. 80) and being “able to reason thoughtfully about the accuracy of documents [by] building –node by node – an elaborate model of this event” (p. 83). Wineburg’s findings reveal *how* experts read the primary sources in this particular situation (or among this set of documents) and the strategies used in the process. He writes, “expertise seemed to rest less on bringing the right problem schema to the task and more on constructing a context-specific schema tailored to this specific event” (p. 83). Therefore experts have an arsenal of strategies, yet those strategies are deployed depending on the task at hand and not necessarily in any particular order.

In a second study, Wineburg built upon his earlier expertise research between experts and novices to compare strategies *among* experts to determine the difference between general strategies historians use and specific strategies historians use in their specialized field when reading documents. In his 1998 study of comparing two historians’ reading of documents about Abraham Lincoln and his role in legislating the Emancipation Proclamation, Wineburg

compared the reading practices of two accomplished historians in order to establish differences between two experts: one a specialist in the Civil War and the other an Americanist but not in that particular time period. Wineburg established what he called the “contextualization” heuristic as the one that “lies at the heart of historical expertise” (p. 337) based on what he learned about the reading strategies of the less specialized historian. Wineburg looked at five components of these professional historians’ think-alouds: amount of reading time, definition of key issues, specification of ignorance, context creation, and the nature of expertise brought to bear on the documents (p. 336). From this comparison, Wineburg drew several inferences about how an expert historian reads sources outside of his realm of specialization. The specialist historian scanned the documents quickly and efficiently while pulling out key issues and chronologies to reconstruct the event. The less specialized historian took more time in establishing what he did not know and what he thought were the important questions that needed to be answered; he made multiple moves between texts to establish links; most importantly, he deferred his interpretation while creating the context for these documents. These collective moves made by the less specialized historian revealed more about what is involved in the reconstructing and building of a context. While it is known that expertise becomes tacit over time, what is important to glean from this article is how one even begins to construct meaning of an event from and between disparate sources, what Wineburg calls “intertextual” reading strategies (p. 335; Leinhardt & Young, 1996). The less knowledgeable historian deemed this necessary in his reading of the texts in order to help establish the context of the event. He moved backwards, between, and through the documents to establish a context first in order to contextualize the historical event.

As part of one of his mini-lectures, John Majewski, the professor in this study, also modeled this practice. An American historian specializing in the economy of the south in and around the Civil War, Professor Majewski did a video-taped think aloud where he read an ancient Roman text to demonstrate to students how one reads a primary source outside of his particular specialization. He showed this video in class to demonstrate what to do when one encounters an unknown text. Within the one source, Majewski made nine moves to make sense of the context of the document. In Wineburg's 1998 study, the historian most familiar with this event in history made three intertextual moves as opposed to 20 for the historian with less experience of this event (p. 335). Establishing these interpretative movements as a central element of historical expertise contributes to the question of to what degree and where was this element promoted by teaching assistants in the lectures and where did students make these movements themselves—especially since the main text in Professor Majewski's course in this study are mostly primary sources (there is a textbook but reading it is not promoted in the lecture nor in the discussion sections).

The most comprehensive literature review of the research on expertise in history comes from two psychologists, who categorized ten expert historian characteristics that reside under three large headings that closely resemble the three main characteristics of expertise of possessing knowledge, structuring that knowledge, and creating meaningful representations of that knowledge (Chi, 2011). This article provides an overview of much of the literature on historical thinking originating from Collingwood's original musings (1946) on the historical imagination. The origin of the characteristics come from one of the two authors' own work on expertise and from a compilation of educational researchers of historical thinking such as Wineburg and Leinhardt. According to Voss and Wiley (2006),

expert historians are adept at obtaining information, constructing narratives, reasoning, and problem-solving. These characteristics, say Voss and Wiley, constitute “inter-related tasks of the historian” (p. 571). Within the three larger characteristics, finer-grained definitions of what those entail reveals a fuller picture of what is at work among expert historians (see Appendix A). Professor Majewski focused on obtaining and interpreting sources, constructing narratives, and reasoning through historical empathy as characteristics of expertise he wanted students to employ. The array of historical thinking processes illuminated in Voss and Wiley’s work throws the expertise characteristics discussed earlier (knowledge construction and representation) into sharp relief. Through their compilation of research from Leinhardt, Wineburg, and others, one can see the sophisticated use of knowledge in reading practices (sourcing and corroboration) and how knowledge is structured (mental representations of events through texts and contextualization).

The work on expertise in history has informed what we know about the cognitive dimensions of historical thinking; thus far this work has been applied primarily to elementary and high school classrooms. Fewer research studies apply to the university classroom and even fewer to large lecture humanities courses. Despite the thorough studies by Wineburg and others focusing on expertise, only a handful of studies have historical thinking to educational settings, and then only in elementary and secondary schools. Wineburg and colleagues have also developed pedagogical applications from their research and have done research on their use in student learning to much success (Wineburg and Reisman, 2008; Reisman, 2011; Reisman, 2012). However, no researchers to date have taken up the intersection between historical learning and threshold concepts in postsecondary large, introductory, lecture course, as I will here.

Crossing into the threshold concepts framework

The threshold concepts framework provides an instructional metaphor for thinking about how students encounter, grapple, and work through and learn disciplinary knowledge. Meyer and Land, who first wrote about threshold concepts in 2003, emphasize the journey towards the acquisition of disciplinary knowledge while focusing on how students “perceive, apprehend, or experience particular phenomena within that discipline” (Meyer & Land, 2003). While research on expertise in history has focused on the cognitive processes involved in historical thinking, the threshold concept framework accounts for both cognitive and affective dimensions of learning.

The work of the historian Lendol Calder serves as one example to illustrate the “linchpin” (to borrow his own phrase) between historical thinking research and threshold concepts research. Calder (2006; 2013), who teaches U.S. history, looks at design issues and assessment in his own courses. Specifically, Calder considers how to help students work with uncertainty by uncovering the cognitive tools necessary to engage in that work. These two themes are also known as “uncoverage” (uncover disciplinary concepts in class versus covering the textbook) and “troublesome knowledge” (the struggle to work with counterintuitive ideas or competing narratives). Both themes emerge from the work of David Perkins, an educational researcher influential in instructional design literature (Perkins & Unger, 1999a) and in threshold concepts literature (Perkins, 1999b; Perkins, 2006). For Perkins, the term “uncoverage” entails revealing the hidden or tacit nature of a discipline for students versus simply covering course content. Disciplinary concepts should drive course design in order to build student understanding. At the same time, Perkins acknowledges that certain disciplinary concepts represent “troublesome obstacles” for students; yet these

troublesome obstacles could lead to a transformed understanding of a discipline. Within the threshold concepts framework, looking at both what needs to be uncovered and how to work through what proves troublesome for students constitute thresholds to cross into a discipline.

In Calder's first article, "Uncoverage: towards a signature pedagogy for the history survey," he lamented the fact that an earlier article by history faculty discussing teaching did not make a "single reference ... to serious studies of cognition, learning, historical thinking, or course design" (p. 1362). Therefore, Calder developed problem-based units where students were asked to employ six "cognitive habits of historians": questioning, connecting, sourcing, making inferences, considering alternate perspectives, and recognizing limits to one's knowledge (p. 1364). He found that students improved in their questioning skills during the semester. While this skill improved, Calder noted his students' inability to know why questioning mattered. "The ability to formulate historical questions led all other areas of improvement (though ironically, and somewhat disturbingly, evidence from post-course surveys indicates that students consistently rate questioning as the least valuable skill to be learned in the course)" (p. 1368). Historians value the role of questioning to establish what is not known and what needs to be discovered in reading sources (Wineburg, 1991; 1998) but the students in this study might not have been capable to recognize that distinction yet. Or as Calder described it, they were not capable of recognizing the limits of their own knowledge. To further push his students towards thinking like historians, he purposely designed his final assessment to reflect the paradox of history: the absence of the "right" answer. "The goal of this intended exercise," he wrote, "was to help students understand history as an evidentiary form of knowledge, a notion that ran counter to the images of reified names and dates that students brought to the classroom" (p. 1367). While Calder ultimately addressed the

important question of how feasible it is to move students to an approximation of expert skills within one semester his findings indicate that students can learn a “basic set of moves crucial to the development of historical mindedness” (p. 1364). In his view, exposure to this basic set of moves is better than none.

In the most recent reflection on his own teaching, Calder (2013) turned his attention to students’ ability to construct narratives of American history. He examines an introductory assignment (one he has given since 1994) in which he asks students to write the history of the United States in 600 words or less. However, the results since 2010 have indicated increasing cognitive dissonance or an inability to write a cohesive narrative that makes sense of competing historical narratives that students have learned in high school -- such as the “Glory story” narrative about America’s pursuit of freedom versus emerging narratives related to oppressed peoples.

Calder cites the Advanced Placement test as the central problem related to this issue, conjuring images of high school teachers feverishly racing through a textbook to get the students to the test in time, armed with the appropriate facts. What is lacking in this college preparation course, in his view, is building students’ capacity to reason among disparate sources in order to construct compelling narratives. Calder argues to situate instruction within compelling narratives for students to model discernment among sources. “This requires [students] to recognize the plausibility of sophisticated narratives that are different from their own, while spurning accounts that are fanciful or plain nutty” (p. 8). For Calder, this is an important shift he has made in his own teaching of the US survey course: moving beyond uncovering historical thinking skills to enabling students to contextualize and

interpret historical events in coherent, cogent narratives. These two emphases in his courses demonstrate a further application of expert historical practices within instructional settings.

Threshold concepts & the university classroom

The central component of the threshold concept framework is acquiring expertise through disciplinary practices, the kind of practices illustrated in Calder's research on his own teaching. However, its other perceived utility in higher education is to prompt investigation into teaching and learning. Meyer and Land described threshold concepts as representing how people think (Meyer & Land, 2003) within a discipline. This representation involves representing how one develops expertise within that discipline. The framework integrates the research on expertise and situated learning together in looking at epistemological functions: how the discipline is enacted, studied, and prolonged through participation from members of the community. Threshold concepts offer a new metaphor for thinking about the core ideas in a field as being a portal "opening up a new and previously inaccessible way of thinking about something" (Meyer & Land, 2003 p. 412). The framework represents a transformed way of understanding, or interpreting, or viewing something without which the learner cannot progress" (Meyer & Land, 1 and opens up a way of looking at disciplinary knowledge that encompasses a way of thinking, a way of acting or practicing, a way of communicating, and in some cases a sense of identity. When a student's understanding transforms, then a threshold is crossed. According to Meyer and Land (2003), particular characteristics are associated with this new understanding. A concept itself is considered *irreversible* (once understood a student cannot look at the concept in any other way); *transformative* (once understood significant shifts in perception of a discipline occur); *integrative* (reveals interconnectedness of discipline); *troublesome* (takes a bit of intellectual

wrangling); and *bounded* (clear demarcation that this resides within one discipline and not another).

Acquiring such processes and concepts takes time and inevitably requires the learner to move along a continuum to fully advance through particular thresholds. Meyer and Land (2006) describe students' progression and experiences with threshold concepts as going through various stages of liminality "the state in which there are two competing ways of seeing a situation, one the established but increasingly inadequate way and the other a new, more powerful and comprehensive way of seeing" (Baillie, Bowden & Meyer, 2012).

Liminality sheds light on the process of student understanding and what it looks like. Meyer and Land identify three stages in which a student might find herself interacting with a threshold concept: the preliminal stage, where prior knowledge and concepts interfere with the new concepts in the course; the liminal stage, where a student thinks, applies, and works with the new concept in some way; and the postliminal stage, which represents the student's ability to think like a member of the discipline. Here, her initial knowledge of the concept has been transformed and integrated into new knowledge (Meyer and Land, 2006, p.23).

Finally in this postliminal stage, a threshold is described as a "portal" or "conceptual gateway" to a discipline. The portal connotes what it means to cross it (or through it) and what understanding looks like when it is transformative, irreversible, and integrative.

Approaching learning within a discipline may pose particular challenges that involve the uncovering of hidden practices within a discipline,

in which ways of thinking and practicing that are often left tacit come to be recognized [sic], grappled with and gradually understood. This underlying game is a common feature of the processes of entry, meaning making and identity formation typically required for entry to a given community of practice" (Meyer, Land, & Baillie, 2012, p. xi).

Some authors have suggested that such an awareness of hidden practices within a discipline reveal an underlying “game” played by students as they move through passageways of the discipline (Anderson & Day, 2005; Pang & Meyer, 2010). Perkins (2006) encapsulates his description of these hidden practices into the phrase “epistemic game,” where “game” can be construed as a course in which students have to figure out disciplinary concepts leading to some concepts being more troublesome to learn than others. “Learners often encounter difficulties playing the 'epistemic games' that go with the disciplines” (p.42). Looking at disciplinary concepts as conceptual gateways and the process of going through those gateways illuminates the middle spaces students inhabit as they encounter a discipline or re-learn a discipline. Understanding difficulties or troublesome knowledge lends itself to understanding the liminal spaces students might find themselves in (Meyer and Land, 2005). One study merges threshold concepts with a theory called “capability theory” describes the capabilities needed by students to learn threshold concepts. Baillie, Bowden, and Meyer (2008) discuss the idea of “threshold capabilities,” capabilities shown to cross a threshold into professional learning. These capabilities, they say, “are in fact thresholds to professional learning in a defined area of knowledge. In combination, the development of a range of threshold capabilities will contribute to the development of overall knowledge capability” (p. 9). In order for concepts to weave through the system seamlessly, the teaching of threshold concepts requires the development of threshold capabilities in professional knowledge among teaching assistants.

Threshold concepts in history

Threshold concepts have been readily identified within the sciences such as computer science and biology (Eckerdal, et al., 2007; Hounsell and Anderson, 2009) and in social

sciences such as economics (Meyer and Land, 2003; Land et al., 2005), but identifying threshold concepts within the humanities disciplines has proven more challenging due to the many facets of important concepts and how those facets are valued in institutional, departmental, and course contexts. In *Issues of Liminality* (2006), Meyer and Land include two examples of what threshold concepts look like in history. They interviewed a historian to discuss troublesome knowledge within a course. The historian explained history as being a “multi-faceted” discipline thus preventing practitioners from identifying a few key concepts to teach when there are many (p. 20). Another historian interviewed expressed a similar quandary. She described a threshold concept as being something that is a set of “distinctive practices,” citing an example from one of her students who “formulat[ed] an opinion, based on the critical analysis of complex sources, yet acknowledg[ed] it was contingent and subject to debate and challenge” (p. 23). The student, presumably, made sense of disparate sources and offered an interpretation knowing that her interpretation might be contested. When thinking about what it means to think within a discipline, Meyer and Land wrote, “Teachers within the disciplines are certainly aware of particular patterns of thought and insights that have ontological significance” (p. 23) yet how to recognize those patterns and teach them is what discussions among teachers about threshold concepts could yield.

Situating ways of thinking and practicing in course systems

These two examples of historians’ reflections on history reveal an awareness of patterns in a discipline but they also reveal the challenges of defining them within the humanities. Because of this challenge, other researchers have offered models for considering these patterns. Two important studies of threshold concepts in history—one directly connected to Meyer’s and Land’s original research and the other using it as a launch pad to another type of disciplinary work-- expose the challenges and opportunities for introducing

threshold concepts at the course level. The first study, Anderson and Day (2005), involved a project that aimed to identify the appropriate course delivery methods for teaching disciplinary concepts. Comparing discrete historical thinking modules in a first year course and a final year course at four different institutions, they interviewed and surveyed students and faculty. Among first year students, Anderson and Day identified challenges or particular thresholds that introductory students need to tackle in studying history: the contested nature of the discipline, the ability to look at topics from different perspectives, and understanding the contextualized nature of historical knowledge and evidence (p. 14). Findings from this study substantiate the need to make the type of thinking desired among students explicit in the course structure. The researchers describe this as a way to connect students to the “disciplinary enterprise” (p. 51).

Anderson and Day reference the learning paradox in history (Collingwood, 1946) where students need historical knowledge to analyze historical events but this knowledge might be limited at first. In their view, this highlights “the need to communicate explicitly to students the expectation for forming historical explanations in a contextualised [sic] manner and to exemplify the ways in which this expectation can be fulfilled” (p. 6). Orienting students to these challenges through course design involves designing situated contexts in which content, assessment, and tasks are integrated thus reinforcing an environment that supports student engagement in the discipline. Finally, their study examined threshold concepts across multiple institutions thus suggesting that faculty found it easier working within a broader set of practices rather than a predefined set of concepts. This further reinforces the idea that the threshold concepts framework works best when situated within whichever university or disciplinary department who wishes to employ it. Therefore,

Anderson and Day propose calling the threshold concepts framework in specific disciplines, “ways of thinking and practicing (WTP).” They argue this term, WTP, affords more possibilities for faculty to consider what disciplinary concepts should be taught (they do not have to be agreed upon within the department, university, or by the discipline) and for students to grasp on to or engage with key disciplinary concepts as they move through thresholds to the discipline. This term encompasses what understanding in the discipline looks like but “[i]t can also encompass ... a sense of how knowledge is generated within a subject, a critical appreciation of the limits of evidence and the contestability of findings, and a growing accomplishment in communicating the subject for differing purposes and to varied audiences” (p. 5). Within this WTP definition, Anderson and Day encompass much of what we know from the historical thinking expertise literature: how experts use and reason about knowledge obtained from evidence at hand; constructing interpretative narratives; communicating those narratives to multiple audiences. These are multi-layered, complex ways of thinking and practicing within history.

Anderson returned to this study in a joint article with Dai Hounsell (2009) to highlight ways of thinking and practicing within two separate disciplines: biology and history. Hounsell and Anderson used their earlier study to create a list of best practices to engage students in disciplinary practices: modeling and scaffolding historical reasoning, aligning course activities with historical practices, and encourage active participation in enacting ways of thinking and practicing in history. The emphasis here simply promotes sound instructional design in order to situate disciplinary learning goals into the structure of the course.

A second study beginning with threshold concepts but proposing alternative models for incorporation at the course level is reflected in the Decoding the Disciplines (DtD) project led by David Pace, Joan Middendorf, Arlene Diaz, and Leah Shopkow. DtD is an attempt to theorize “epistemological obstacles” within multiple disciplines. The project began with a focus on defining threshold concepts in history at their respective university. Soon after, though, the focus shifted from faculty defining concepts to faculty explaining where students got stuck (“bottlenecks”) when engaging with the discipline of history (Middendorf & Pace, 2004). In an unpublished report, Pace and Middendorf explain their move from threshold concepts to bottlenecks, “The humanities do not have concepts that all historians must accept ... consequently, “threshold concepts” have worked well for scientists, but less well for social scientists and poorly for humanists.... *Decoding the Disciplines* offers faculty a methodology for revealing the disciplinary unconscious that underlies student bottlenecks as well as offering a way to help students negotiate these difficulties in the classroom” (Pace and Middendorf, 2011, p. 21). Therefore, Pace and Middendorf place student learning and troublesome knowledge at the center of uncovering disciplinary practices versus trying to define them.

Discussing concepts within a discipline provides one avenue to begin curricular innovation, but Pace and Middendorf decided to take a more practical approach. Meyer, Land, and Baillie (2010) describe this approach as looking at “problem of impasses in student learning not from a theoretical perspective (although theory is quite useful in grounding its practices), but from a practical approach that emphasized both the modeling of expert behavior for students and the explicit explication of its underlying epistemes” (p. xxx). Pace and Middendorf consciously moved from creating a project where a department

defines concepts in the discipline to a project where faculty define where students get stuck and subsequently how to structure courses to help students in these troublesome moments.

Through the discussion of bottlenecks, the DtD project focuses on curricular interventions to support students who face these conceptual bottlenecks due to the “the realization that instructors do not necessarily have a clear or complete vision of what constitutes their practice and what, therefore, they need to convey to students” (Pace, 2008, p. 97). Understanding specific historical processes and ways of knowing (Voss and Wiley, 2006; Anderson and Day, 2005), Pace and Middendorf argue, could contribute to better course design. They found that breaking major assignments down into smaller assignments supports the scaffolding process of cognitive processes; the use of visual metaphors to explain concepts; concept maps in class; and the act of going public for students’ and reflective analysis essays. Taken together, these interventions, in Pace’s view, situate students within historian’s tasks.

While this project attempts to distance itself from the threshold concept framework, it also points to the need to make any attempt to uncover challenging disciplinary concepts, dependent on the university in which the investigation is taking place. This point is an important aspect within threshold concepts literature – discussions around threshold concepts are context-specific and serve various institutions in different ways. While this might have been a criticism in the past against the generalizability of findings from individual practitioners interested in improving teaching and learning (Cochran-Smith & Donnell, 2006), the threshold concept framework and how it is used in the contexts presented here necessitates the idea of context-specific work and finding out what works well for teachers and students in their particular institution. In the case of a research university with an

established system of large lecture courses like UCSB, application of the threshold concepts framework will function differently due to its diffusion through the teaching assistants in their discussion sections. This is in sharp contrast to Pace's and Middendorf's attempt to incorporate threshold concepts in classes of 50 at a medium-sized university or Lendol Calder's application of historical thinking skills in his own seminars at a small, regional college.

Threshold concepts on a larger scale

Anderson and Day (2005) alluded to the concept of survey courses as being “settled territor[ies],” void of instructional innovation or redesign and content-driven. However, my study challenges this idea. Incorporating disciplinary frameworks into large lecture courses could be considered *unsettled* territory posing specific challenges for teachers, graduate students, and students alike. This study takes into account what aspects of disciplinary thinking and practices— threshold concepts -- are possible to introduce in large lecture course settings.

Teaching large classes poses significant challenges beyond connecting students to the discipline. What constitutes a “large” course varies. Exeter et al. (2010) set the limit at 100 to 500 students. Diaz et al. (2008), members of the Decoding the Disciplines project at Indiana University, counted a large lecture course to be between 150-250 students (p. 1222). Carbone and Greenberg (1998) described a study of large courses at the University of Maryland where the issue for faculty was in meeting learning goals within such a large setting (and presumably if those goals were met).

Most researchers on large classes focus on issues of engagement and leveraging technology to address those concerns rather than introducing students to disciplinary

contexts. Challenges of teaching large lecture courses focus on engaging and connecting students to course content (Mulyran-Kyne, 2010; Reid, L., 2013). Some instructors attempt to make the large lecture setting small by using creative group work (Cooper and Robinson, 2000). However, there are few articles on large humanities courses or on the role of the discussion or recitation sections associated with large lecture courses. As Majewski pointed out in an interview after his class had ended, “in some ways it should be the sections that are the most important part of the course so this [course data] is really interesting to me to be reminded of how important that is and that link is critical” (McGowan, Interview, 2013). This is valuable teaching time where the threshold concepts in history could be further situated for students to enact, apply, and discuss. In the current large course model, the discussion section provides a key link between the historical thinking lectures and students’ ability to do some historical thinking.

Looking at expertise, situated learning, and threshold concepts framework together reveals three key points of connection between the literature and the focus of this dissertation. First, teachers possess both tacit disciplinary knowledge and pedagogical content knowledge (Shulman, 1986). Professor Majewski, having taught the course in this study for more than 15 years and displaying a keen interest in how students learn historical thinking, discovered in recent years that he was not making explicit what it meant to construct contested narratives even though he used key historical thinking terms throughout the course: source analysis, integrating evidence in a thesis statement, and argumentation. In a study of a previous iteration of his course that examined writing practices in Majewski’s history course, researchers found

... ways in which the course pointed to threshold concepts in history ... were only implied, not explicitly emphasized. The idea that students were writing for a

particular genre and discipline was left unstated—it was assumed that the emphasis on argumentation, thesis, and evidence would enable students to understand how they might be applicable to other courses without clearly distinguishing historical thinking from other disciplines (Adler-Kassner, Majewski, & Koshnick, 2012, paragraph 26)

Following this study, Majewski reflected further on how to make threshold concepts in history explicit and tangible to students while maintaining balance with historical content resulting in the idea of mini-lectures given at key moments in the quarter. This reflection on his own teaching follows the type of reflection Lendol Calder brought to his own teaching practices. Paxton and Wineburg (2000) argue, “giving students the authority to be historians may be a powerful idea, but it does not go far enough. Rather it is important for the teacher to create a classroom atmosphere supportive of the structure of historical research” (p. 858). Furthermore, it is crucial for the professor to support TAs in structuring the classroom atmosphere in order for the threshold concepts to travel throughout the course.

A second key connection involves experts’ ability to manipulate knowledge based on the task at hand, also known as “adaptive expertise” (Bransford, 2001). The description of this quality of expertise is seen in what Wineburg noted in the contextualization heuristic of experts in his 1998 study and the heuristic Wineburg claimed is central to the discipline. Adaptive expertise encompasses affective and cognitive dimensions of learning in that an expert adapts to the task given (whether it is in the field of specialty or not) and the expert is comfortable in working with uncertainty, grappling with multiple sources, and taking as many moves necessary to represent understanding of the task and how to go about solving it or making sense of it (Bransford et.al., 1999; Hatano, 2003; Bransford & Schwartz, 2009; Chi 2011). The historian who was not as familiar with the particular historical question at

hand nor was he familiar with the primary source documents analyzed underwent the following process:

Once he became immersed in these documents, it was what he didn't know that came to the fore: his way of asking questions, of reserving judgment, of monitoring affective responses and revisiting earlier assessments, his ability to stick with confusion long enough to let an interpretation emerge. It was how he responded in the face of what he didn't know that allowed him, in short, to learn something new (Wineburg, p. 340).

Coupling the contextualization heuristic with adaptive strategies provides one approach for working within uncertainty about historical events that leads to learning, according to Wineburg. Land et al. (2005) contend that not only do students learn to work within uncertain or counterintuitive aspects of history, they also need to learn to tolerate dealing with uncertainty (p. 59).

A third key connection between this literature review and my research is the idea of building texture to new understanding with disciplinary, interpretative tools. In the context of this study, the new understanding being developed is among the TAs and the students. Expertise literature supports application of threshold concepts in history are the ideas of legitimate peripheral participation (Lave and Wenger, 1991) and developing "texture" around concepts learned (Brown, Collins, & Duguid, 1989). In thinking about their metaphor for learning and the initiation of a novice into a community, a novice begins at the periphery of a community and gradually moves to the center. Situated learning theory-- embedding students into expert practices-- helps professors think about how to move students from the outskirts of a discipline to its core while using particular tools and knowledge to add texture to their understanding. One way to add texture to new understandings is to make sure the concept travels fluidly throughout the course (Wenger 2010); in the context of this research, building texture involves TAs' abilities to implement practices to support the application of

the historical thinking concept into their discussion sections. In the threshold concepts literature, Land et al. (2005) proposed developing “frameworks of engagement” that draw students into moments of recursiveness and excursiveness; providing key moments of reflection on newly learned concepts that help propel them in the progression of the course.

Finally, it is important to keep in mind that expertise is not developed within a quarter or semester. As Wineburg (1998) noted, “creating coherence from [a] textual mélange [of multiple sources] is a major cognitive achievement,” (p. 337) one not easily accomplished within a bounded timeframe but developed and practiced over time, Brown, Collins, & Duguid (1989) claimed that students should not be expected to become professional practitioners but understanding how tools are used in authentic situations initiate the process of entering into the discipline. Calder (2006) noted that it is still worthwhile to introduce students to basic moves that foster “historical mindedness.” Such an achievement takes time to build. The expertise studies reveal multiple strategies and heuristics for students to practice in their own work.

My research questions focus on what the application of threshold concepts in history look like within a large lecture course. Wineburg (1991) confirmed the level of historical knowledge is not what needs to be elevated; it is pointing students towards identifying the contexts and situations in which that knowledge matters. Hounsell and Anderson (2009) speak to this very point in discussing the competing discussions around what constitutes historical knowledge. “The fact that historical knowledge is marked by quite high levels of controversy would seem to have important implications for undergraduate learning and teaching, given that there may be more scope for students to exercise personal interpretation and judgment ...” (Hounsell and Anderson, p. 77). Taken together these studies suggest

threshold concepts framework serves as a way to think about introducing and explaining the multifaceted, complex dimensions of the discipline for all participants involved.

CHAPTER 3 METHODOLOGY

Overview

During the winter quarters of 2013 and 2014, I conducted a qualitative research study of a large-lecture history course at the University of California Santa Barbara (UCSB). *History 17B: The American People*, is a general education requirement and it serves as a requirement for the history major. The UCSB *Catalogue* states the course focuses on “sectional crisis through progressivism. A survey of the leading issues in [A]merican life from colonial times to the present. The course focuses on politics, cultural development, social conflict, economic life, foreign policy, and influential ideas. Features discussion sections.” In his own syllabus (Appendix E), Majewski defined the course as:

... exploring the importance of contested narratives, context, and primary sources via the history of the United States from 1840 to 1920. We will focus on how the expansion of commerce, the growth of cities, the settlement of the West, and the rise of big business created divisive social and political conflict. Our goal is to understand how Americans debated the meaning of liberty, equality, and other political creeds.

The course met as a large group, three times a week on Monday, Wednesday, and Friday for 50 minutes. Each TA held three discussion sections a week occurring throughout the week, also 50 minutes in duration. For each quarter, Majewski had nine teaching assistants. The graduate student teaching assistants in the history program had varying levels of teaching experience ranging from one to three years of teaching experience during their time in graduate school at UCSB. In addition to the course lectures and the discussion sections, the TAs and Majewski met in a weekly TA meeting at the start of the week (Monday). This type of weekly TA meeting was intended for the professor and students to discuss the readings for the week, pertinent themes for the course, and a way for the

professor to field questions from the TAs related to course logistics and in some instances, facilitating discussions. Each TA, in turn, was responsible for developing a lesson plan or list of study questions each week to distribute to the other TAs. This served to provide each TA the opportunity to design a lesson plan and to receive feedback on it from Majewski and the other TAs.

Majewski had been teaching this course since 1995. The course had gone through many iterations of revision. However, the impetus for the change he implemented in 2013 concerned his reflections on the threshold concept literature he began to read in 2012. The work of Erik Meyer and Ray Land caused Majewski to consider the core concepts of the discipline and how to make those concepts explicit within his large lecture course.

This study addressed the intervention made on the part of the professor to introduce threshold concepts to students in History 17B in 2013 and 2014. In order to make threshold concepts explicit to students, the professor designed seven “mini-lectures” focusing on these concepts, which he defined as threshold concepts to himself and, to students and TAs, as historical thinking lectures, to complement his existing material. These lectures occurred during the quarter on Monday, Wednesday, or Friday. The delivery of the lectures depended mostly on the content lecture for that day. For instance, the first two lectures occurred on a Monday, but the historical empathy lecture occurred on a Wednesday because that was the day Majewski started the unit on slave resistance. The list of lectures is illustrated in Table 1.

<i>Table 1. The seven historical thinking lectures given in 2013 quarter</i>	
Time of quarter	Subject
Opening day of class	Introduction to Historical Thinking

Second week	Analyzing a primary source
Third Week	Historical Empathy
End of third week and before the first essay was due	How to write a thesis statement
Fourth week	How historians argue I (Presentation of professor's own research on soil cultivation during Civil War and the criticism related to his research)
Fifth week	Causation & counterfactuals
Seventh week	How historians argue II (Contested narratives about Lincoln freeing slaves)
Tenth week	Summary of historical thinking lectures as they pertain to the final. He stressed to students they should be able to develop arguments, analyze narratives, and use evidence to support arguments.

Research Questions

The central, overarching question of my research focuses on the effects of the inclusion of threshold concepts in this course. In order to determine the effects, I traced the movement of the concepts within the course and how the professor interpreted them in his historical thinking lectures and how the TAs represented those concepts in the discussion sections. My research questions pertain to the impact this intervention made on two levels of participants: for the professor and the teaching assistants. I would have discussed the impact on students but the small number of responses on the surveys and in the interview volunteers (4) precluded me from focusing on their contributions at the same level as the professor and the teaching assistants. The origin of the questions related to the professor's intervention, embedding threshold concepts into the course. Further questions about how he defined those concepts contributed to understanding the distinctions he made in his own mind and how those functioned within the historical thinking lectures. Questions pertaining to the TAs and

the experiences played a role in determining the pedagogical choices they made in the classroom. Lastly, there were only four student interviews yet those interviews provide a glimpse into the student perspective of the concepts. Overall question of the study: What are the effects of the inclusion of threshold concepts into a large lecture course? Finer-grained questions specify the type of effects of the inclusion of threshold concepts in the course:

How does the professor define the threshold concepts to include in his course?

- How did those concepts get articulated and implemented within this large course system?
- How did he differentiate between threshold concepts and historical thinking?
- How did his definitions evolve over time?

How do teaching assistants incorporate these concepts into their own discussion sections?

- What capabilities did the TAs demonstrate in their own teaching to translate and frame these threshold concepts?
- How did these concepts have an impact on their own thinking about the discipline?

Based on the intervention of the professor and TAs, what are the initial effects on students in the course on the inclusion of historical thinking?

- What concepts affected student thinking about history or historical thinking?

To answer these questions, I developed an analytical framework grounded in the conceptual framework of the literature review to trace the concepts as explained by the professor, as the TAs represented the concepts in their discussion sections, and in limited examples, the interpretation of those concepts by the students.

My role. In Winter 2013, my role was to carry out my research plan. In 2014, I planned to gather more data to look at the effects of the revisions Majewski made to his course based on the 2013 findings. My new plan centered on looking at what occurred in the TA meetings to determine how Majewski framed his explanation of threshold concepts to them. However, when Majewski and I discussed his plans for changing the course, I offered to create two resources, using anonymous data from my work, to support what he planned to do in class. I created a new primary source reading guide (Appendix J) based upon the one TAs used in 2013, but I merged using the strategies he used in his think-aloud video, the strategies of the TAs I observed. Therefore, my role turned into one of a moderate participant observer where I had to balance this new “insider” role of developing materials the TAs used and my outsider role of researcher (Spradley, 1980).

Participants

Professor. John Majewski is a professor of American history who specializes in the economics of the South before, during, and after the Civil War. He also serves as the associate dean of the division of humanities and fine arts at UCSB. He has taught this course since 1995. During the course of the study, we had two unrecorded conversations about the direction of his course prior to the start of each quarter. He agreed to participate in a think-aloud to uncover his own primary source reading strategies. He agreed to let me record his historical thinking lectures during the course. Finally, he consented to two interviews: one at the end of the 2013 course and the other in January 2014.

Teaching assistants. I will discuss the teaching assistants according to the year in which I observed them.

<i>Table 2. Teaching Assistant Participants in Study</i>			
TA	Year in Program	Quarters of teaching	History courses TA'd prior to History 17B
2013			
TA1	2 nd	2	17C, 17A
TA2	2 nd	1	17A
TA4	3 rd	4	2011: 2C; 2012: 17B, 17C, 17A
TA5	3 rd	6	At UCSB: 2011: 2C, 17B, 17C 2012: 2A, 17B, 17C At another university: 4 semesters of teaching in MA program
2014 (TAs 1 and 5 agreed to be observed again in addition to:)			
TA6	3 rd	4	History 17A, History 4C, History 2A, History 7
TA7	3 rd	4	History 17A, 17B (2013), 17C; History 5
TA8	2 nd	4	Black Studies: 1, 5, 169BR History 17A

2013. In 2012, I attended the meeting where Majewski met his cohort of TAs for the first time. There were nine TAs total. During the meeting, I introduced the intent of my study and I invited all TAs to participate via a sign-up sheet. Of the nine TAs, four agreed to participate in the study meaning that I would observe one of their weekly discussion sections and each TA agreed to an interview following the quarter. Of the four TAs, none of these TAs attended UCSB as undergraduates.

- TA1 was in her second year. She majored in Economics and French in a regional liberal arts college prior to coming to UCSB. She had only one quarter at UCSB of teaching assistant experience before teaching in History 17B. The discussion section observed for this study occurred on a Tuesday.

- TA2 was in his second year. He majored in history at a Canadian university. He had only one quarter of teaching assistant experience before teaching in History 17B. The discussion section observed for this study occurred on a Tuesday.
- TA4 was in his third year in the program. He had four quarters of teaching assistant experience prior to the winter of 2013. The discussion section observed for this study occurred on a Wednesday.
- TA5 was in his third year of the program. He was a teaching assistant at a prior university while earning his master's degree (four semesters of teaching) and he had taught six quarters at UCSB prior to teaching History 17B in winter 2013. The discussion section observed for this study occurred on a Wednesday.

2014. In 2014, I decided to conduct the same observations of TA discussion sections. One of the outcomes from 2013 was that the professor needed to focus on explaining his threshold concept intervention to the TAs. Therefore I shifted my attention to the TA meetings leading up to the start of the quarter and within the first two weeks of the quarter. Similar to 2013, I attended the introductory meeting between Majewski and his new TA cohort. I invited the TAs to participate in the study. This time five TAs agreed to a weekly observation of one of their sections and they agreed to complete an online survey (based on the 2013 interview protocol). Two of the five TAs were TA1 and TA5 from the 2013 cohort. The additional TAs were:

- TA1. I observed her section on a Thursday.
- TA5. I observed his section on a Thursday.

- TA6 was in his third year of the program. He had four quarters of teaching assistant experience prior to winter 2014. The discussion section observed for this study occurred on a Wednesday.
- TA7 was in his third year of the program. He had four quarters of teaching assistant experience prior to winter 2014, including teaching History 17B in 2013. The discussion section observed for this study occurred on a Wednesday.
- TA8 was in her second year of the program. She had TA'd in the Black Studies department. This was her second time teaching a history course in the UCSB history department. The discussion section observed for this study occurred on a Wednesday.

Students.

<i>Table 3. Students Participants in Study.</i>			
2013			
Total Number Enrolled	Enrollment in Sections I observed	Total # of Sections Observed (out of 124 possible)	Total # of Students Observed
441	TA1 = 18 TA2 = 17 TA4 = 17 TA5 = 17	24	69
2014			
456	TA1 = 17 TA5 = 17 TA6 = 18 TA7 = 15 TA8 = 18	10	85

Selection of students.

2013. In Winter 2013, there were 441 undergraduate students enrolled in History 17B. Most students took this course as a general education requirement for the history, psychology, or sociology majors. For the surveys, I posted a link to each of the three surveys (pre-, mid-, post-) to the LMS system. For each survey, Majewski made an announcement in class asking students to fill out the survey, stressing that it was optional, anonymous, and not tied to a grade. On the final survey (deployed following the end of the quarter), I included a field where the student could insert his or email address if they consented to an interview. Seven students provided their email addresses; only four actually responded to me to schedule a time to be interviewed:

- **Student K** was a sophomore who planned to major in psychology. She took the course as a general education requirement. She had been in TA2's section.
- **Student A** was a junior sociology major. She also took the course as part of her major requirement. She had been in TA4's section.
- **Student C** was a junior English and Sociology double major. He took the course for his major requirement. He had been in TA1's section.
- **Student D** was a sophomore history major, taking it as part of the history major requirements. He had been in TA1's section.

2014. I did not interview students in Winter 2014 because the focus of the study shifted to how the TAs were explaining concepts in their sections. I conducted a mid-quarter survey with 43 respondents out of 456 (9%) to gather feedback on the first two historical thinking lectures and if the students perceived the TA as connecting the historical thinking lecture to the discussion. Two additional questions about how the TA incorporated the lectures into the discussion were added. I asked specifically if the TA introduced the new

primary source reading guide developed in Winter 2014 and how many times it was referenced per week. These questions contributed to the newer focus on the teaching assistants and their efforts to uptake the lectures in their discussion sections.

Data Collection

In order to capture the complexity of this course system, I used the following methods to answer my research questions: participant observation, surveys, and interviews. I collected multiple data points throughout this study represented in Table 4.

<i>Table 4. Data Points</i>	
2013 Data collected	Numbers
Online surveys: pre-	48
Online surveys: mid-	34
Online surveys: post-	58
HT Lecture Transcripts	7
Discussion section transcripts (and accompanying field notes)	24
Interviews	4 Teaching assistants (TA1, TA2, TA4, TA5) 4 students (2 for TA1, 1 for TA2, 1 for TA4) Professor
2014 Data collected	
Online student survey: Mid TA Survey	43 7 out of 9
HT Lecture Transcripts	2
TA Meeting Transcripts	3

Discussion section transcripts (and accompanying field notes)	12
Interview	Professor

In addition to the above data points, I also used the transcript from a 2011 focus group (Focus Group Transcript, 2011) wherein Majewski articulated his first list of threshold concepts in the discipline. I used this transcript to establish a timeline of Majewski's evolution on his thinking and articulation of threshold concepts from the 2011 to my final interview with him in 2014.

Majewski's lecture observations. In my observations of Majewski's lectures, I audio-recorded the lectures and transcribed each one. Because I did not know what each historical thinking lecture would contain, I used these transcripts to provide a detailed description of how he described the particular concept in his mini-lecture. In 2013, I attended and audio-recorded six of the seven historical thinking lectures. In 2014, I attended and recorded the first two historical thinking lectures (ways of thinking in history and analyzing primary sources).

Discussion sections observations. My methods for observing the discussion sections directly connected to my research question about how each TA incorporated the historical thinking lectures in the discussion sections. Each teaching assistant (TA) was responsible for teaching three discussion sections each week (to different groups of students) totaling 120 possible sections to observe. Following each one of Majewski's historical thinking lectures, I observed the discussion sections to see where the historical thinking lectures surfaced in how the teaching assistant framed the discussion and if there were relevant student comments

in relation to the TA prompts. I audio-recorded each discussion section.

I saved each audio recording to a secure location on Dropbox. I took field notes in a Google Doc during the session. My field notes totaled four pages for each. Through my notes, I listened for specific moments when concepts were being discussed. When an exchange seemed fruitful, I would mark in my notes the time on the recording and make a note to highlight this portion of the discussion in the transcript. I noted exchanges between the TA and the student where the concepts surfaced. I based my field note protocol on Glesne and Peshkin (1992) where I made objective descriptions on everything that happened in the discussions through “observer comments.” I listened for verbalization of concepts and historical strategies within the TAs’ discussion prompts. I did not look for facial expressions or physiological features among the TAs or students. In particular cases, I noted the tone, laughter, or sarcasm on the part of the TA. I added my own subjective comments separately using the Google Drive comment feature. Embedding the actual transcript with the notes allowed me to fill out the descriptive comments I took. These notes reflected what I heard in the discussion related to the concept lectures. I noted what was going on in terms of the TA’s question prompts to students. Then I transcribed the recording for each session in the same Google Doc with my field notes to have them in one place.

Surveys

My use of online surveys directly connected to my research question about how the historical thinking concepts affected the students’ approach to the course content. I used the qualitative responses to illustrate student thinking on the threshold concepts.

2013. In 2013, each survey was designed in Google Forms and made available to students through the university's learning management software for the course (a Moodle environment called Gauchospace). I designed the opening survey to get baseline information about the students in the course and their preliminary definitions of what the study of history is (connected to the professor's first historical thinking lecture about meaningful and contested narratives). The mid-quarter survey, again deployed through Gauchospace, aimed to gather formative feedback on the historical thinking lectures to date as well as gather feedback from students who did an online assignment in place of a discussion section. The online assignments were used as discussion participation within the week of a federal holiday when classes did not meet in the winter quarter (Martin Luther King, Jr. holiday.)

The final survey aimed to gather feedback on all historical thinking lectures and how students would apply these concepts to other history courses and non-history courses. First, I administered the final survey to the specific classes I observed (and the two other sections that completed the online assignment) following the end of the quarter. When response rates were low for these sections, I deployed the survey to the entire class. In total, I distributed the survey to all enrolled students and received 50 responses. The qualitative responses provided a window into the student perspective on the historical thinking lectures. In addition, a question asked students if their knowledge about the study of history changed as a result of this course. In 2013, of the 50 respondents, 30 checked yes, 17 said "no," and four left the question blank.

2014. I only administered a mid-quarter survey in 2014 because the students had seen the four main historical thinking lectures at that point. I based the survey on the 2013 mid-quarter survey and I added two questions about the new primary source reading guide introduced in this version of the course. I received 43 responses to this survey, 8 respondents were in sections of the TAs I observed that quarter.

Interviews

The surveys were used to form the basis of each of my interviews. I used Miles and Huberman's notion of "reduce and shape" for my interview protocols in order for each interview to inform the next. This allowed me to tailor the interviews to each person.

Professor. I interviewed the professor twice, once in 2013 at the end of the quarter and following the other interviews I did with the TAs and four students; and in 2014 at the beginning of the quarter. I developed a semi-structured interview (Patton, 2002) for each interview because the interview was tied to relevant data. The goal of each interview was to gather his reactions and thinking. Each interview lasted for forty-five minutes. I transcribed each one.

For the 2013 interview, the foundation of the interview was a chart (Appendix B) I made to show the four main concept lectures that were repeatedly discussed in the data (TA interviews, student interviews, and student surveys). I illustrated the concept through what the student said about the concept, what happened in the discussion section related to that concept, and what the TA said about the concept in his or her interview. This represented a table of initial findings to discuss with the professor in this interview.

In the 2014 interview, the foundation of the interview was the *Five Keys* document that Majewski wrote to describe his current thinking about the threshold concepts in history.

In order to understand the evolution of this document, I presented him with excerpts from his past explanations of these concepts in order to understand how the evolution occurred and how he intended to use the document in the course. I also used the interview to find out when he planned to deliver any further concept lectures.

TAs. I only conducted TA interviews in 2013. I did one interview per TA in his or her office in the history department. Each interview lasted forty-five minutes. I conducted the TA interviews first [Appendix C] once the quarter was over. In these interviews, I was most interested in gathering information related to my research questions: How do teaching assistants incorporate these concepts into their own discussion sections? How do these concepts have an impact on their own thinking about the discipline?

The interview protocol aimed to collect responses to my research questions related to their experience and perceptions of the threshold concepts. I divided the protocol in three sections: questions about teaching experience (related to my research question on capabilities), questions about the historical thinking lectures in relation to a specific instructional episode from their discussion (their perceptions of Majewski's lectures), and reflection questions about their progression in becoming practitioners in the discipline (their perceptions of threshold concepts and how it related to their own work). In addition, I showed the TA the anonymous survey results from the students within the section I observed to discuss the students' reaction to the historical thinking lectures and what the students thought was most helpful in discussion sections. If there were confusing aspects of the student survey results, I asked each TA if there were clarifying questions they would want me to ask the students as I conducted the student interviews next. For instance, TA2 found

the student responses curious as he knew he did not explicitly talk about the historical thinking lectures in his discussion yet the student respondents thought he had.

Students. Following the TA interviews, I conducted four student interviews [Appendix D] to gauge their understanding of the historical thinking lectures and how they applied those concepts in their own work. These students agreed to be interviewed through the final survey given at the end of the quarter. In the final survey, I asked students if they would be willing to be interviewed about their responses. Four students agreed to be interviewed. In combination with the protocol asking them about their perceptions of the historical thinking lectures, I asked them specifically about their qualitative responses in the survey and how those responses reflected what either the TA had done in class or what the professor had done in lecture.

Methods of Data Analysis

To answer my research questions, I used a range of qualitative methods to gather attitudes and perceptions about the threshold concepts framework. These methods contributed to the analytical framework I used to examine the classroom observations. At a general level, my goal in analyzing the data was to see how the intervention of seven mini-lectures had an impact on how those concepts were used, how they were taken up in discussion sections, and if these mini-lectures made any significant difference in how the teaching assistants and students understand the theoretical underpinnings of history. Therefore my qualitative analysis of the discussion sections, interviews, and open-ended questions within student surveys were analyzed using a general inductive analysis approach (Thomas, 2006) where I coded, categorized, and conceptualized possible explanations. Thomas explains, “The inductive approach ... is intended to clarify the data reduction

process by describing a set of procedures for creating meaning in complex data through the development of summary themes or categories from the raw data” (p. 239). These summary themes will be seen in my analytical framework.

Professor’s lectures. As mentioned before, I did not analyze the professor’s lectures. The transcripts of these lectures described the professor’s approach to the concept and they provided a roadmap or outline of the concept. This outline provided a framework in which to see where the TAs incorporated the concepts in their discussion sections.

Classroom observations. These observations formed the cornerstone of the case studies in chapter four. The instructional episodes revealed what happened in terms of the concepts surfacing in the discussion sections. My analysis of the discussion sections directly connected to my overall research question about the effects of the inclusion of threshold concepts within a course as well as capturing a picture of the type of capabilities needed to teach threshold concepts.

Following each historical thinking lecture, I attended four discussion sections each week. Initially, I used an inductive analysis of the transcript data to see what themes emerged from the class discussions (Charmaz, 2006; Thomas, 2006). Once I converted the documents to Google Drive, I read through the transcript closely using the comment feature to do further coding of salient points within the discussions and interviews (Mostyn, 1985; Saldaña, 2002). Next, I used the qualitative software program, Dedoose. In addition to basing my analysis on Thomas’ procedures, I used the coding software program Dedoose. Within this software program, I completed the first cycle of coding while attaching analytic memos to my codes. Using Saldaña’s (2009) descriptions of first stage of coding to describe what I had coded, my codes fell into the descriptive, process, and initial coding schemes

within Dedoose. In the software, if a particular passage in the transcript described interesting phenomena then I used descriptive codes to highlight if a historical thinking concept lecture was mentioned. A descriptive code is simply a code that outlines what was said, in other words, I transcribed for the literal verbalization of each concept. Next, I focused on the TA actions through process coding to note what I found within TA actions. Since I am looking at where the threshold concepts were included in the discussion sections, it was important to look at the actions and processes used by the TAs. In addition, the Dedoose program allowed me to write short analytical memos to link to particular passages. If I came across similar salient passages in other transcripts, I could then link them back to my original memo. The memo structure in the software is specifically meant to facilitate grounded theory research as described by Charmaz (2006). For instance, if I noticed a particular action TA4 did in his discussion and we discussed this action within his interview, there was an analytic memo describing why I thought that action was significant.

The use of this software served to help me establish multiple “data displays” (Miles and Huberman, 1994) through which I manipulated the codes and emerging concepts from the data. As a form of initial coding, analytic memos serve as an internal dialogue journal for my own thoughts on why I apply codes to particular units within the data and how those codes could be categorized further. This software allowed me to organize my first cycle of coding to hone in on the moments where the concepts appeared and what those moments were saying in terms of the TAs’ capabilities for introducing the concepts at that point. From this visual display of codes and memos, I was able to organize the codes under the stages of uptake in my analytical framework.

Surveys. I gathered quantitative data within the surveys (e.g., rate the helpfulness of each historical thinking lectures) yet I focused on the qualitative answers that directly said something about each of the threshold concepts. Three questions proved most useful in this regard and contributed to the possible effect threshold concepts could have on student thinking:

Have any of the historical thinking lectures listed above affected the way you approach studying history or how you think about history?

If yes, name one or more of the historical thinking lectures and describe how it affected the ways in which you approach history or historical thinking. How did this lecture change your thinking? In what ways were you able to apply this new approach to your work or discussions?

Which historical thinking skills from 17B do you think you will apply to other history courses?

For each case study in chapter, I include the responses to these questions to illustrate the possible effect the concepts had on students based on what they wrote.

Interviews. Following the final survey in 2013, I interviewed each TA whose section I observed and the instructor (Majewski) after the spring quarter. The protocol design for the TA and student interviews aimed to guide respondents through a series of questions that were conversational in tone yet written to elicit as much information as possible (Patton, 2002; Glesne & Peshkin (1992). Miles and Huberman (1994) support the notion of using interviews to inform other interviews. This proved helpful when designing the student interview as I used information or specific questions from the TA interviews. The responses I received from both sets of participants informed my interview with the professor interview. As with my classroom observations, I transcribed each interview in Google Docs and did an initial coding through the comment feature. I then uploaded the interviews in Dedoose to

code them with the first cycle codes I developed to look for any correlation to existing codes and memos. These moments of connection to existing memos highlighted the dramatizations that can also be described as “rich points” or surprising moments from the data that provide the substance for analysis and interpretation (Agar, 1994) in my case studies.

Professor. In order to trace the professor’s evolving definitions of threshold concepts in history, I compared his statements from four data points: his responses from the 2011 focus group, an unrecorded meeting I had with him in September 2012, his interview in 2013 and his final interview in 2014. In my comparative analysis, I looked at the types of concepts he articulated, which ones endured over time, and how each concept connected to the historical thinking lectures done in class.

TA. Following the 2013 quarter, I was most interested in gathering TAs’ perceptions of what Majewski had done in embedding threshold concepts in the course. Understanding their perceptions on the lectures, threshold concepts, and teaching would help me understand the processes I coded in the discussion sections. This directly connected to my research question on the impact of the concepts on their own thinking and how their own thinking played into what happened in their discussion sections.

Students. As with the surveys, I targeted key moments within the interviews where students discussed particular concepts. I showed each student who agreed to participate his or her responses from the final survey in order to help them elaborate on what they had written. I analyzed the student interviews looking at their specific examples for how a concept lecture affected their thinking and in some cases, the actual written work.

Phase 2 Analysis: Moving toward a theoretical explanation for the instructional episodes through case studies.

I developed an analytical model, incorporating literature from chapter two, based on my findings from my initial analysis of data in order to give finer-grained explanations of what occurred around each concept introduced in the course. Based on the interviews with teaching assistants and students, I will focus specifically on the discussion section transcripts that dealt with the historical thinking lectures mentioned by these participants. Using the triangulation (Johansson, 2003) of the classroom observations, interviews, and survey data, I constructed case studies for each of the concepts mentioned most in the data to explain the “career” of the concept. The choice to represent the careers of the concepts through a multiple-case study design fit Yin’s (2012) criteria for using a case study method to illustrate the instructional episodes: the method fits the research questions I am trying to answer related to effects and the method allows me to answer these questions within a “real-world context” (p. 5). The historical thinking lectures referenced most often were the first four delivered in the course: creating meaningful and competing narratives, analyzing primary sources, historical empathy, and thesis statements.

In order to explain what happened in my data, I decided to focus on and trace the movement of these four concepts throughout my data, specifically focusing on the classroom observations to illustrate the notion of uptake. But I needed to develop a more nuanced way to describe the type of uptake that occurred. While the TAs did not replicate Majewski’s historical thinking lectures verbatim, in many instances there were complementary practices occurring but I needed to determine how exactly those practices reflected the governing concepts of the course. Therefore I returned to my literature review to construct an analytical

framework for looking at this large system of learning and what happens when participants, in this case the TAs, take up new concepts introduced by the professor. Looking at how the concepts moved through this large system provided one perspective in which I could trace the movement of the threshold concepts throughout the large lecture course or essentially a large organization. Brown and Duguid (2000) and Wenger (2010), situated learning theorists, discuss the processes of knowledge acquisition in organizations. Understanding the structure of the course and the practices involved in the work of the professor and the teaching assistants (TAs) helped to uncover the potential movement of the threshold concepts in a large course and the associated practices and dispositions necessary to facilitate that movement.

The research questions of this study encompass how concepts were explained, interpreted, and disseminated in a large lecture course. The extent to which these concepts were explained, interpreted, and disseminated indicates the viability of the concepts within a course, or learning system, to travel from professor to students. Similar to the idea of a concept's ability to travel, Etienne Wenger (2010) described the adoption of his own concept, communities of practice, as having a "career" that expanded in ways he and his colleague, Jean Lave, never anticipated. He described the concept as "simple, intuitive" and influential in many different fields, particularly educational and corporate organizations. Taking the idea of a concept and its career throughout the system provided a road map for looking at the career of threshold concepts in this history course. Wenger (2010) looked at how his concept affected multiple systems from corporations to educational institutions. In my analytical framework, I will focus on three particular elements of what he includes in his definition of a

system: its structure, its participants, and its practices (p. 179), particularly the TAs and their improvised practices for including threshold concepts in their discussion sections

Stages of embedding threshold concepts: Uptake, Translation, and Conceptual Framing

Career of the concept. Movement of threshold concepts – in Wenger’s terms, the advancement of their career through the system -- does not happen automatically. The only way a student can work on threshold concepts is if the concepts are mediated in some way by the professor or the TA through an instructional explanation (Leinhardt, 2004). Even the level of the mediation and the capabilities of the people involved play a role in whether or not a threshold concept moves through a system. In order for concepts to weave through the system seamlessly, the teaching of threshold concepts required an examination of the practices involved in doing so. Pedagogical adeptness to understand the historical concept, the threshold concept, and how to combine the two concepts for the students in the discussion became a crucial area in studying the effects of threshold concepts applied to a large course. For students to learn these threshold concepts in a big system like a course, though, they have to be distributed – from the professor to the TAs to the student. In this sense, even the *idea* of threshold concepts has a “career.” Additionally, learners do not come to threshold concepts all at once – they access them through threshold capabilities. So for students and their understanding of history– the “outcome” level of the career of an idea – to actually understand the concepts, the TAs had to successfully “uptake” the threshold concepts, translating them and then representing those concepts to students. For example, one of the threshold concepts in History 17B was historical empathy. The simplistic meaning was “putting oneself in someone else’s shoes.” In history, the concept was useful when analyzing

primary sources, particularly sources within controversial time periods. However, additional steps or frames were necessary to incorporate the concept fully into the discussion.

Capabilities. In looking at the discussion sections and the efforts of the TAs to include threshold concepts, the TAs displayed varying understandings of the concepts presented by the professor and varying abilities for introducing those concepts in their own teaching. Therefore, the TAs' capabilities for translating and framing those concepts those within discussion sections are a central focus of this study. To advance the careers of the threshold concepts introduced by Majewski, TAs needed to have what Baillie, Bowden, and Meyer (2008) described as "threshold capabilities," abilities that "define thresholds to professional learning in a defined area of knowledge" (p. 10). If students encounter threshold concepts in class, they will need the professor and TAs to mediate the development of those concepts in some capacity. Baillie, Bowden, and Meyer used this term in the context of student learning, how one student develops certain capabilities that lead to understanding of threshold concepts. In this study, I will use the term "threshold capabilities" in context of teaching to describe how the TAs embedded the threshold concepts in their discussion sections. TAs demonstrated a range of threshold capabilities in their teaching. These threshold capabilities contributed to the ways in which TAs framed the concepts for students to practice them in sections. Their own thinking about the discipline and their prior teaching experiences shaped TAs' capabilities. The TAs' capabilities to address threshold concepts also affected undergraduate students' understandings of them. To understand the potential threshold capabilities of the graduate students, I will use the concepts of "uptake," borrowed from genre theory, translation, and "conceptual framing" from historical thinking research. These theories provide useful lenses through which to interpret the TAs' practices.

Uptake. In Reisman's (2011) study of historical thinking in high school classrooms, she used the notion of uptake to describe the teachers' "talk moves" (Cazden, 2001; Nystrand, 1997) in whole group discussions around primary sources at the high school level. Reisman drew a distinction between "generic" talk moves and "disciplinary" moves within discussions. I coded my discussion section transcripts according to Reisman's notion of uptake, but the disciplinary talk moves of the TAs were not as discernible as the types of uptake that occurred. The TA prompts were not necessarily disciplinary but it led me to refine what I looked at in terms of the concepts appearing in the discussions. Analyzing my transcripts through this "disciplinary talk move" served as an interstitial coding step that produced the second cycle of coding through the types of uptake of the concepts that occurred within the course. This newer analysis approach connected the historical thinking lectures to how teaching assistants used them during discussion.

Translation. However, the notion of uptake of the concepts within discussion sections applied, but exactly what did the uptake of the concepts look like? As Reisman adopted the notion of uptake from Cazden (2001), I adopted Freadman's (2002) notion of uptake within genre studies. The idea of uptake entails the application of the threshold concept in the discussion section either by naming the concept (contested narratives, historical empathy) or using it to frame the discussion. In addition to the uptake of the concept, Freadman's use of the term "translation" fits the idea of how the TAs incorporated the threshold concept into discussion. As she explains, translation is indicated when a concept is repurposed, a signpost used to point in a particular direction: "any subsequent sign translates the previous sign into a different language, a different conceptual framework, a different set of assumptions, or let us say, a different genre" (p. 43). The degree of

distribution of a concept from the professor's lecture was a signpost indicating the particular stage in which the TA incorporated the concept, a moment in the concept's "career." At times, the TA's translation of a concept derived from the professor's lecture in addition to her or his own prior knowledge on the topic or their prior way of teaching the concept (as in the case of analyzing primary sources – a concept that contained multiple applications by TAs yet differed from the professor's own framework). The question of whether or not the TA incorporated concepts in their own discussions indicated to some degree their ability to do so.

Conceptual Framing. Throughout this study, the role of the TA as the intermediary between the official course system and the students became an important space to analyze because of the range of uptake, translation, and framing capabilities. In terms of framing the discussion, I returned to Reisman's study (2011) and her use of the term "contextual framing" that she defined as a teacher's ability to provide contextualization for students through their talk moves. "Contextual framing" occurred when teachers used questions or prompts to move students towards the historical thinking skill of putting primary sources into context. In the context of my study, I would like to appropriate this term as "*conceptual framing*" in order to examine the moments where the TAs advanced the careers of threshold concepts, using them as a resource for engaging students in discussion. While uptake and translation indicated the career of the concept at play in the discussion sections, the notion of "framing" indicated a more comprehensive approach to integrating the threshold concept in the discussion section. In these instances, not only did the TA translate the concepts for students, they solicited student involvement in practicing these concepts. Consistent focus and deliberate practice with the concept represented key signposts that conceptual framing

occurred in relation to the threshold concept, thereby advancing its career and potentially contributing to its application by TAs and by the students in their sections.

Stage of Uptake. Through my adaptation of Freadman’s and Reisman’s work, it was possible to identify different “stages” through which TAs demonstrated the range of uptake of the threshold concepts. In some ways, the stages the TAs went through to apply threshold concepts in their discussions also parallel the process of stages of faculty professional development in understanding threshold concepts identified by Erik Meyer: engagement, description, interpretation, and action (Meyer, 2012). The stages of uptake differed in the level of engagement with the concepts and they defined the actual actions of the TAs. I devised the table below to identify where each TA fell within this range.

Table 5. TA Stages of Uptake of Threshold Concepts in Discussions

	TA Stage 1: No mention of concept	TA Stage 2: Minimal reference to concept	TA Stage 3: Translating the concept or action	TA Stage 4: Using concept as conceptual frame for discussion
Concept mentioned in professor’s lecture	Explanation: No mention of the professor’s lecture or terminology surfaced.	Explanation: One or two elements of the lecture surfaced in the discussion.	Explanation: The TA brought up the concept and incorporated it into the discussion.	Explanation: The concept provided a framework for the discussion and a place for students to apply the concept.

The professor developed an evolving set of threshold concepts he wanted to make explicit to students. The challenges that arose out of this integration came from the degree to which the teaching assistants, bringing their own unique teaching approaches, decided to take up what the professor was trying to do and how they provided a framework (not necessarily the professor’s framework) for students in incorporating the concepts within their discussion

sections. The stages of TA uptake, translation, and framing of each concept will be in chapter four; that is their development of threshold capabilities associated with the development of concepts. As data suggests, the farther along the trajectory of uptake the TAs were, the more likely the concept traveled from professor to TA to student. A possible final “stage” of the career of a threshold concept was its conveyance to students and their ability to provide further reflection on how the concepts had an impact on their own thinking or work done in class.

Despite the low number of student participation in interviews (n=4) and the final survey (n=50 who completed every question), there was a connection between the TAs’ stage of development on the trajectory I outlined and the movement of the concept from TA to students. TAs’ stages of development, then, seem to have contributed to the careers of the concepts – especially in the few cases where students noted they would apply the concept in future history courses. In fact, in telling the cases of the careers of these concepts, student data (interviews and final survey comments) yielded fruitful points of analysis where the concept traveled further than anticipated. These particular cases will be explained in depth in relation to certain concepts in chapter four.

Limitations of study

This is a baseline investigation of what might be possible approaches to incorporating threshold concepts into a large lecture course. As a preliminary investigation of ongoing work, there are limitations associated with it. Professor Majewski, prior to developing this course, had been reflecting on the role of threshold concepts for one year. As a result of his own ongoing research into and thinking about threshold concepts, he developed a list of threshold concepts –based on his thinking about the discipline and how he wanted to

incorporate them into his own class. His reflections on the use of threshold concepts and historical thinking, however, was (and is) still in process -- so the professor was learning about threshold concepts and incorporating them into his teaching while simultaneously introducing them to his graduate students. From the scholarly teaching perspective, this project could be categorized as an initial step at looking into what is possible to do (Hutchings & Shulman, 1999). He came up with some concepts, discussed them in class, emphasized key terms in essay questions, and held a weekly meeting with teaching assistants to talk about the course.

However, in these weekly meetings, the professor did not explicitly tell the teaching assistants to incorporate the historical thinking lectures into their own discussion sections nor, at times, did he tell them when the lectures would occur (even though they were listed on the syllabus, the lectures in the latter half of the course shifted dates or did not occur at all). The teaching assistants learned about the historical thinking lectures at the same time as students, creating a climate of uncertainty about whether a teaching assistant would or would not speak to the content of the historical thinking lectures in the discussion section. Therefore, any discussion or documentation of historical thinking that occurred during the TA-led discussion was at times, unintentional. Finally, the number of interviews of teaching assistants constitutes a reasonable sample size (four of the nine teaching assistants), but interviews with students are less representative. Only four students of the 72 enrolled in discussion sections I observed (out of the 441 students enrolled in the whole course) agreed to be interviewed. Therefore, documenting student reactions to the pedagogical intervention is not as representative as initially hoped.

CHAPTER 4 ANALYSIS

Introduction to Analysis & Case Studies

The results of the inclusion of threshold concepts in a large lecture course are divided into two main sections: winter quarter 2013 and winter quarter 2014. These main sections are organized into four discrete concepts that surfaced most in the interview and survey data. Each concept section outlines how the professor, the graduate students, or the students explained the concept. The organization of each concept section follows the order of the research questions of this study in looking at how the threshold concept framework had an effect on the course system at each level: for the professor, the teaching assistants, and, in small instances, the students. Through answering the research questions at the participant level, we can trace the distance the concepts traveled through the large lecture course system.

The research questions of this study look at the effects of threshold concepts within the system of a large course. In order to look at the career of concepts in the course, it is necessary to understand the structure of the course and the roles of the participants. Among the participants, there exist specific roles and identities. How these participants interact and enact practices within the structure reveals the extent to which concepts have an impact on one's thinking. When new practices are introduced, this has a potential impact on the participants and the structure of the system. In the case of this study, the large lecture course is a system. The participants consisted of the professor, TAs, and students, and the new practices introduced were threshold concepts.

The professor, after much reflection on threshold concepts, decided to make the concepts explicit through targeted lectures. The professor's nine teaching assistants' (TAs) responsibilities were to lead discussion sections dedicated to reading and analyzing primary

sources within the context of the professor's lecture. The TAs translated course content and historical concepts for students in the weekly discussion sections to varying degrees. Within these discussions, TAs displayed moments of "uptake," examples of usage of the threshold concepts in guiding students to think like historians. In addition, some TAs used the concepts to frame the discussion. Interviews with TAs revealed their own thinking on the inclusion of threshold concepts and their capabilities to include them. Finally, there is evidence of student perceptions of the role of threshold concepts on their own thinking and course work. How knowledge or information moves from person to person within a large organization affords an analytical lens on the data I collected.

Winter 2013

Preparation toward the application of threshold concept framework to History 17B

In order to understand the careers of concepts moving through a system such as a large lecture course, I will describe how each participant played a role in the careers of the threshold concepts that surfaced in three components of the system: the professor's lecture, the TA's discussion section, and in the student interviews. First, I will look at events in the professor's evolution of his thinking on threshold concepts that went into the course prior to the start of my research. Next, I will discuss the four main concepts from the Winter 2013 course (chosen because of the frequency with which they came up in data): contested narratives, analyzing primary sources, historical empathy, and thesis statements. Within each concept, I will describe how Majewski framed the concept and then look at how the TAs brought those concepts into their own discussion sections. In some instances, I will examine the student response to the concept. This progression from professor, to TAs, to students will trace the careers of the concepts. This tracing is important because it provides insight into

questions about how the TAs incorporated concepts into their courses and what capabilities they demonstrated in doing so. Furthermore, it determined what they valued about the concept in terms of their historical knowledge and teaching knowledge. Finally, the tracing of concepts – to some extent – speak to the initial effects on a limited number of students of the incorporation of these concepts.

Evolution of Majewski’s Thinking: August 2011. The initial portion of the careers of the threshold concepts in History 17b began with John Majewski, a professor of history who teaches the course. Professor Majewski engaged in a separate study with Dr. Linda Adler-Kassner about historical thinking among students enrolled in a linked writing course to History 17B. This was prior to Adler-Kassner and Majewski reading about threshold concepts; the impetus for their study was to look at how students differentiate historical thinking goals versus general education goals. Majewski had established an interest in seeing how students develop historical thinking skills within his course. This marked the first study for him to consider historical thinking aspects of his own course. During an August 2011 focus group discussion (Focus Group Transcript, 2011) with his TAs from the Winter 2011 iteration of the course, Professor Majewski identified core historical concepts central to the discipline:

1. History as a **sophisticated discussion** or argument about the past;
2. The **use of evidence** to support your points; how you use evidence in logic.
3. Transferring the **skills of analyzing evidence and making logical connections** into your written work
4. Making **persuasive points** in sections
5. **Practice using primary documents**, actual artifacts produced by the past in constructing persuasive historical arguments. (Focus Group Transcript, 2011)

In Majewski’s list, he situated the core concepts within written work and discussion sections. After hearing what his TAs considered core to the discipline he added one more concept to

this list, "... understanding the complex relationship between the past and the present. How the present shapes your understanding of the past and the past shapes our understanding of the present and that kind of complex back-and-forth." He considered his list as core concepts to the discipline and he talked about the concepts as a guiding framework to being in the discipline. "For me, if you understand what history is, ... if you ... have the right general conception and the right kind of framework you can quickly catch up to speed on the specifics. So it doesn't matter to me as much if it is Western [Civilization], World History, or US, what matters to me is that they're kind of getting the big concepts" (Focus Group Transcript 2011). Regardless of time period or course, Majewski stated that these core concepts, as a framework, could support students in doing history.

During this discussion, Professor Majewski referenced students' ability to build thesis statements compared to experts' ability to craft theses. In his Winter 2011 iteration of the course, Majewski added a lecture on crafting thesis statements showing a series of statements that ranged from poor to excellent before he learned about threshold concepts. This type of additional support, he said, made a central historical method more explicit to students. He explained to the TAs and focus group facilitators, "[T]here's a lot of stuff that we take for granted and I am now learning that ... we have to make this stuff explicit about what we want or what we are trying to convey and that is part of teaching" (Focus Group Transcript 2011). Majewski stated well here the tacit nature of historians and connected it to the need for students to see these tacit processes. One of the TAs in the focus group confirmed that this explicit lecture around thesis statements helped her students. "One thing I witnessed as a TA is I felt like it really made the students [think,] 'my writing is going to be evaluated seriously and the bar is being raised, I need to work really hard on this.' I felt like I ended up

having a lot more students visit my office hours to specifically talk about their writing in a very detailed way more so than other times I've TAed" (Focus Group Transcript, 2012). Due to this focus group, Majewski saw one example of an effect of his thesis statement intervention. This initial discussion around core concepts to the discipline, an intervention made by the professor, and an observed effect in the discussion sections led to the professor thinking of other ways to make threshold concepts more explicit to students.

Evolution of Majewski's Thinking, September 2012. The next phase in the career of these concepts and how they made their way into History 17B occurred prior to the start of Winter 2013 quarter. By this point, Majewski and Adler-Kassner were drafting an article (Adler-Kassner, Majewski, Koshnick, 2012) about their findings from 2011 using threshold concepts as a lens for writing about the ways in which students interact with disciplinary knowledge. Prior to the start of the winter quarter, I met with Professor Majewski to discuss what he constituted as threshold concepts in history and how he planned to include them into the course. A dual purpose of the meeting was to see how my research methods could support Professor Majewski's efforts to make threshold concepts more explicit in his course.

Majewski wanted students to recognize that the study of the past is universal. He wanted to frame the discipline as something that surrounds people at all times regardless of a student's major, but also point out that historians have a particular way of thinking about the past. This "way of thinking," then, was associated with the threshold concepts of the discipline. He identified his overall goal for the course as a chance to demonstrate how historians think. When prompted to state how he would describe threshold concepts in history, Majewski listed four concepts:

1. **Historians borrow theories:** Skepticism around application of theory to historical analysis therefore they borrow theories from other disciplines (e.g. Foucault, Keynes, Bourdieu, etc.)
2. **Use of evidence:** How historians use primary sources
3. **Narrative and context:** Information is linked and gives meaning to other pieces of evidence; history as analytical narrative; also one of competing narratives
4. **Complex relationship between present and past:** This concept alluded to presentism which he defined as the “Goldilocks” approach to viewing the past through the lens of the present; the importance of understanding this concept is attached to establishing context.

The career of the concepts morphed from six to four within the course of one year. While his first list related to what he would like to see students doing in written work and discussion, this list conveyed broader disciplinary ideas. Relationship between present and past, context, and use of evidence were constants in the list, the introduction of the notion of narrative and context (still connected to evidence) were new. Additionally, Majewski focused on the concept of the use of critical theory in history.

As he discussed his thinking on these concepts, Majewski presented the idea of doing mini-lectures on these threshold concepts before he launched into the content-oriented lectures. He considered extra-credit essay assignments to see if students thought or wrote differently as a result of being exposed to these threshold concepts. We determined that I would observe his mini-lectures and seek permission to observe discussion sections. We did not discuss the course design further before his initial meeting with his teaching assistants in December 2012.

Professor Majewski invited me to the first TA meeting in December 2012 to meet the TAs and review the syllabus. This meeting represented a critical transition point for the career of the course’s threshold concepts, because it was the primary point of contact between the professor, Majewski, and the TAs who led smaller (17-18 student) discussion sections once weekly. In this first meeting, Majewski began this process of communication

and perpetuation of the careers of these concepts, briefly explaining how his thinking derived from reading Meyer and Land’s (2003) work on threshold concepts. However, this would be the point where the term “threshold concepts” moved to the background while “historical thinking” moved to the forefront, a minor shift in wording that I will explore in the Discussion section.

He explained to the TAs that he had reflected on this idea of making aspects of what historians do more explicit in the course through the threshold concept lens so therefore he had decided to include seven mini-lectures throughout the course that emphasized what it meant to think like a historian. He included the titles of these lectures in his actual syllabus (See Appendix E). These mini-lectures were:

<i>Table 6. Mini-lectures in 17B</i>	
Time of quarter	Subject
Opening day of class	Introduction to Historical Thinking
Second week	Analyzing a primary source
Third Week	Historical Empathy
	How to write a thesis statement
Fourth week	How historians argue I (Presentation of professor’s own research on soil cultivation during Civil War and the criticism related to his research)
Fifth week	Causation & counterfactuals
Seventh week	How historians argue II (Contested narratives around Lincoln)
Tenth week	Summary of historical thinking lectures as they pertain to the final. He stressed to students they should be able to develop arguments, analyze narratives, and use evidence to support arguments.

This represented his plan for including threshold concepts, which Majewski referred to as historical thinking, into the course.

For the purpose of this analysis and for consistency in my narrative of what happened during the course, I will refer to these lectures as the “historical thinking lectures.” My study, then, focused on how threshold concepts were embedded in a large lecture course via these historical thinking lectures. Threshold concepts provided the impetus and language for the professor to think about what he would do differently in the course to explain disciplinary principles to students by serving as a guiding framework. However, when the course began, the working terminology shifted from threshold concepts to historical thinking. For the purpose of this analysis, I will trace the career of the concepts he identified in his course even though the central concepts were titled “historical thinking lectures.” This terminology switch will be discussed more in Chapter 5. However this switch, in thinking of the career of the threshold concepts, indicated a crucial transition for Majewski, who felt he had to translate the threshold concepts further in more specific language for the students.

Following this introduction to the TAs on the logistics of the course, there were no further mentions of threshold concepts or the planned historical thinking lectures in the TA weekly meetings I observed during the Winter 2013 quarter (one TA, in his interview, confirmed that he did not mention the lectures further and that the lectures often came as a “surprise;” TA4 Interview, 2013). It appeared the TAs were to determine how to (or whether or not to) incorporate the historical thinking lectures into discussions. While this TA meeting proved to be a critical place where Majewski could have discussed his intended goals for embedding threshold concepts in the course, this did not happen. The careers of the concepts

and their ability to travel in the system became dependent on the TAs' ability to take up the concepts and translate or frame them for the students.

Winter Quarter 2013: Concept One --Historical Thinking Lecture: Meaningful & Contested Narratives

Professor: Presenting an overview to historical thinking. Within the first historical thinking lecture, the professor framed his definition of what it means to be an historian and outlined the actions of historians as being unique from other disciplines. This lecture served as an overview of the actions or processes of historians; the threshold concept terminology faded to the background as he emphasized the actions and methods that historians use. He couched these actions and methods as expectations for students' performance in the course. This lecture served to point students towards the actions needed to cross through historical thresholds.

Professor Majewski chose to emphasize the following broad aspects of historical thinking in this overview. He stressed to students that the definition of history was more than just the study of the past. "I've come to think that this is a seriously misguided understanding of history. First of all, historians do far more than study the past. We communicate about the past, we argue about the past, we write about the past. 'Studying' is way too passive to convey what we try to do." Instead, Majewski implored them to engage with the discipline as historians do. The essence of being an historian, he explained, centers on the act of engagement with contested narratives about the past. Again, he moved away from saying that reading and writing about these narratives are part of the class, and instead he promoted the word "engaging" as the action that takes place when students encounter historical narratives. "The thing to keep in mind is that it's not that historians study the past but that

historians have a unique way of studying the past. Of thinking of and about the past [H]istorians are all about reading and engaging with *meaningful* and *contested* narratives about the past.”

Professor Majewski discussed the discipline of history as unique from other disciplines that also analyzed the past in some way such as economics, sociology, English, and biology. His point centered on the way in which historians analyze the past as a set of unique actions to implement in this course. Emphasizing disciplinarity in this overview served to generate awareness among students that this course was nested within a discipline with its own epistemology separate from other course they were taking at the time.

He shifted to explaining the concept of historical narratives and the associated actions that go into creating narratives, analyzing narratives, and how to make them meaningful. He acknowledged that narrative meant a “story” and described narratives as a series of stories about the past. “So one way of thinking about history is that it is stories that unfold over time that are meaningful and contested.” The term “meaningful,” in regards to a historical narrative, he said, encompassed both the types of questions historians ask about a narrative and the temporal nature of those questions. The narrative does not change but the questions or analytical methods brought to the narrative at any point in time can change the meaning of a document. Deriving meaning from a document also lent itself to attaching significance to the document or the ideas within the document, according to the professor.

Switching from meaningful narrative to the idea of a contested narrative, Professor Majewski explained that history itself is a series of contested narratives. He discussed this concept as one that could be *transformative* to students, to borrow threshold concept terminology, because it led to a reconceptualization of what history consisted of versus

thinking of the discipline as a series of facts, events, and dates. He described “contested narratives” as a “tricky” concept. In terms of the threshold concept lexicon, Majewski framed this concept as one that could lead to transformation, irreversible to prior knowledge, counterintuitive, and potentially troublesome. He continued, saying in the lecture, “This is one of those concepts that are often tricky for students because you want to come in and have a set way of thinking about the past. You want to consider the past as unitary that [it] is kind of an unfolding of events that happened. And that once we have that unfolding narrative in mind, we want to hold on to it.” Here, the professor asked the students to reconsider their preconceptions about history through the actions of analysis, questioning, and engaging with arguments about narratives; it was an invitation to question the sources in front of them instead of taking them at face value.

He positioned his acknowledgement that students’ prior knowledge about history might be limited and phrased the challenge of doing history as finding the arguments within these contested narratives. “But what makes history exciting, interesting is that the narratives are contested. [H]istorians disagreed about narratives all the time. Especially their interpretation and their meaning.” He referenced the Civil War to prove this point while orienting them to the content of the course. He explained the dates of the war were true—nothing could be contested about dates. But the questions historians asked over time have been contested through various narratives and arguments: “Why did the Civil War start? Why did it drag out for four long years? Why did the war end up killing more than 700,000 young men who fought in the conflict?” He went on to explain, “In history you certainly have facts and those facts are often important but what those facts mean are often contested.” The professor furthered this point by saying it was possible that students could

disagree with each other, the TAs, and himself thus challenging the students to engage in narratives through argument and evidence. At this point in the lecture, the professor positioned history as a discipline with its own set of actions and practices that contribute to understanding the past. Next, he would go in depth on what those actions and practices looked like.

The professor shifted from discussing the narratives students would review in class to how to write their own narratives about history. This shift denoted the point when he started talking about the specific actions and practices for students to use in this course—essentially a verbal rubric for students in assessing their own writing. “[W]hat we’re trying to teach you in 17B are the standards that professional historians, people who teach history at universities use, who write about history, ... when evaluating why certain narratives are ... more persuasive than others.”

The professor moved from discussing historical thinking to historical writing. Some of the items he discussed at this point were previously considered core concepts that he had identified in the 2011 focus group: primary sources must support your claim and clear writing should exhibit logic and persuasion. He listed verbally a generic series of questions for students to consider when writing essays that addressed cohesion of narrative, logical organization, and appropriate use of evidence. He concluded this section of his lecture by defining what historians do: they think about contested narratives and they persuade others about their accounts of history.

The final part of his lecture addressed the question, “why should students learn to think like an historian?” Professor Majewski explained analyzing evidence, compiling evidence for an argument, and incorporating evidence in a narrative comprised good training

within history as well as other disciplines. “I would say that more important is that once you begin to think like an historian, once you understand that the past is the set of contested narratives you are in much, much better position to analyze the narratives that are all around you.” Using the recent presidential election, he harkened back to one of his original threshold concepts from our September 2012 meeting where he stated that history is a discipline surrounding people at all times. The analytical tools he listed for students, he explained, could help them to differentiate the competing narratives surrounding them at all times.

In discussing the importance of perspective, Professor Majewski positioned this as being an act of historical thinking. He connected how historians think to the process of developing a perspective on a topic or narrative. He emphasized that the act of historical thinking does not provide an easy solution but it allows one to understand that everything is contested. “One of the things that history does is that it gives you a sense of perspective. We don’t necessarily know where we are going but you know where we have been. And that perspective is really, really important in understanding in something that history can provide.” This represented the first instance in an emergent theme of dealing with uncertainty in historical thinking that would be seen in later lectures.

He concluded the class with reminding students of the nature of disciplinarity: understanding how one discipline works helps to understand the required actions and processes in another discipline. The concepts discussed in this overview covered a range of ideas. However, the main points consisted of bringing awareness to students about the methods of history as being distinct from other disciplines; particularly the role of the narrative in creating history: analyzing narratives, writing persuasive narratives, and

developing a perspective on history based on contested narratives. These were the first set of essential concepts conveyed in the course.

Returning to the idea of the career of the concept and how it is adopted in a system, within this first class session of History 17b in Winter 2013, Professor Majewski established what Wenger (2010) refers to as the “regime of competence” of the course: a system of learning that facilitates the development of a perspective, using particular tools and methods to participate within the discipline (p. 180). This regime represented the initial starting place for the careers of the threshold concepts. Next, I begin to trace the career of this idea that form this portion of the regime of competence, reflecting the extent to which TAs took up the concepts incorporated in this regime. The ways in which this uptake was enacted and how the careers of the concepts advanced will be examined through analytical framework of stages of uptake.

Winter 2013: Concept One: Meaningful & Contested Narratives in TA Discussions

Table 7. Concept One and the TA Stages of Uptake of in Discussions

	Stage 1: None	Stage 2: Minimal	Stage 3: Translation	Stage 4: Frame
Professor’s Lecture: Meaningful & Contested Narratives		TA1		
		TA2		
			TA4	
	TA5			

As table 7 indicates, three of the TAs incorporated minimal references to the threshold concept that history consists of meaningful and contested narratives. I will discuss what these TAs did before looking at one TA’s attempt to translate the actual themes of Professor Majewski’s first lecture: the role of the contested narratives in history; analyzing

narratives, writing persuasive narratives with evidence, and developing a unique perspective on historical events.

TA Stage 1: No mention of the meaningful and contested narrative concept. TA5 spent his first discussion section reviewing the syllabus, outlining the schedule of the course, and taking attendance. To his students, he described his teaching style as facilitating “open discussions about the primary documents. The lectures will be [the] context for [the] discussion section where you will discover the magic of history.” When discussing the required essay assignments, he communicated that he will conduct writing workshops in the class. He also stressed that what was most important in writing essays was “your interpretations matter given your unique perspective.” Even though he mentioned the notion of perspective, he did not allude to the historical thinking lecture. However, in TA5’s interview following the quarter, I asked him if any of the historical thinking lectures resonated with him and he identified the meaningful and contested narratives lecture:

TA5: You know, ... I think I somewhat try and structure my sections along that idea. You know, just getting them to understand that even with this same material that we are going to, that we have different interpretations of it and, uh, and uh, doing history is about battling it out.

Me: Would you say that was something you emphasized throughout your discussion sections throughout the quarter?

TA5: Um, yeah. I think so. I mean perhaps not consciously, but yeah, I think so.

As seen in this excerpt, even though TA5 did not reference the idea of meaningful and contested narratives in his own discussion section, it did resonate with his own thinking about history on some level. Based on what TA5 did in this section and what he said in his interview, there appeared to be a gap for him between the importance he ascribed this “idea” and then structuring this session within it.

TA Stage 2: Minimal reference to meaningful and contested narrative concept.

TA2 established ground rules for his discussion section that differed from the other TAs in their opening discussions. He outlined the discussion section as a space to “do history” while at the same time not being a place where they review lecture material. One of his proclamations within the first ten minutes of his discussion section was:

In terms of office hours, we can talk about anything you want but I especially recommend if you want to talk about anything from the course, lectures, or course content like that, come to my office hours because *we don't talk about lectures in here*. So if you have any kind of concerns about the major themes of the lectures or anything like that we'll talk about it in office hours.

At this moment, it was unclear if he would disregard everything about the lectures or if he would reference parts of the historical thinking lectures. TA2 reserved the first ten minutes of his course to discuss the syllabus, discussion section expectations, grading, and plagiarism. Two interesting moments emerged within this monologue that alluded to Professor Majewski's discussion: developing one's own perspective on history and viewing the discussion as a place to converse about history. First, TA2 described the purpose of the discussion section:

The purpose of section is to alleviate the pain of being in a huge lecture class where you don't know each other and you don't get to really participate in your own learning process. That's what we're going to do here. So it's really ... focusing in on participation and collective learning.

He situated the discussion section as a place of metacognitive, participatory learning. Instead of extending the passivity associated with taking a class in a huge movie theater, the discussion section is a space to participate and engage in the contested narratives of the course. Second, he framed the actions and methods of history according to his own perspective:

Ideally this is a chance for you guys to bounce your ideas off of each other and really do some nitty-gritty, fingers in the pie history. And I look forward to participating in our discussions. It's good to think of this as 'our' discussions. I'm not really a professor or a teacher, but a facilitator.

These were two small instances that this TA was attuned to student-centered learning and the idea of the discussion section as a place to enact historical methods (“fingers in the pie”) where he described his identity as the facilitator for their learning.

While TA2 focused on describing what they would do in discussion sections, TA1 focused on the assigned reading for that week. TA1 did not attend the first class meeting of 17B where the professor discussed historical thinking. Therefore, there was only one area of overlap between the terms Professor Majewski introduced in the lecture and what TA1 did in her section. Although it was her first meeting with this discussion section, she did hand out a primary source reading guide (Appendix F) in order to analyze the first assigned reading, a letter written by Andrew Jackson (obtained from a fellow graduate student). She divided the class into groups directing each group to look for “the main things he's [Jackson] saying and then we'll go through the end and each group will say what he is outlining.” In the final three minutes of the discussion, she prompted students to summarize the “gist” of the piece.

Another word for the 'gist' here can be ... what is Jackson's argument in this piece? So lots of times historians will go through something [with these questions in mind] what is this author arguing? What is he trying to say? What is the main argument? Can you think of another synonym for an argument?

This was the first mention of explicitly point out what historians do in her discussion section. According to TA1, she described historians as looking for the argument of the source through a series of questions about a document. In asking students for the synonym of “argument,”

one student responded with the word “thesis” wherein the TA took the opportunity to talk about writing:

So when you are writing [Andrew] Jackson here provided a really good example of what a strong thesis statement should look like. In that first paragraph he says 'this second charter for the national bank is wrong' for these reasons and then you see him support that really well throughout the rest of his memo. So this is also instructive for when you write your papers. Make sure you write a strong thesis statement and have an opinion that you are trying to prove.

Without having seen what Professor Majewski did in class, this TA relied on her primary source reading guide to frame the class discussion. Even though she did not use the professor’s language of historical thinking verbatim, she did three things in her discussion section that indicated an effort to translate aspects of historical thinking: analyzing a source and recognizing an argument. First, she used a required reading (Andrew Jackson’s memo) for the class activity lessening the “burden” on students to read something extraneous in order to practice analyzing a source. Second, she had students practice their analytical process to demonstrate her expectations for how they should read primary sources outside of class. Third, she used the primary source to demonstrate how Jackson formulated his thesis with supporting evidence to prompt students to think about their own writing. While she might not have reached her full conceptual framing capabilities around the concept of meaningful and contested narratives, she did translate important aspects of analyzing a primary source that she used throughout the quarter. The career of the contested narrative concept did not surface completely but she addressed important actions that historians use when analyzing sources. She was the only TA I observed who made the students analyze the Andrew Jackson veto letter in the first discussion section meeting taking her identity as a teacher, someone who structured the session according to Majewski’s recommendations, seriously.

TA Stage 3: Translation of meaningful and contested narrative concept. While TA1, TA2, and TA5 made minimal references to the historical thinking lecture, TA4 demonstrated one instance of translation in his introductory discussion section. This TA began his discussion section talking about primary sources, mainly asking students to list examples of them. After six minutes of discussing primary sources, he oriented the students toward the required reading for the following week, the *Narrative of the Life of Frederick Douglass, an American Slave*. Students identified this as a primary source, but then the TA asked students about the role of memory in Douglass' account of his firsthand experience, "Okay, just to play devil's advocate then, how does memory function in Frederick Douglass where he's writing about stuff that happened thirty years before he wrote it?" A student responded that it was a personal memoir and the memory of slavery was something the author experienced. The TA then asked back, "Is memory history?" To which one student replied, "Pretty much all the history that we have is based off someone's experience which in turn becomes historical memory."

At this point, the TA rose from the table to approach the chalkboard. He said, "Now I'll write on the board. What are the concepts of thinking historically that Professor Majewski brought up in the main lecture? What does it mean to think historically?"

Student: meaningful and contested narratives about the past?

TA4: What else? What was another important part of Professor Majewski's thinking historically?

Student: [inaudible]

TA4: Do you mind if I write 'evidence' for that? [writing on board]. And there was one more big component.

Student: Whether or not it is persuasive?

TA4: Ok so this is where we're at [in the discussion] right now. What

does a meaningful and contested What does 'history consists of meaningful and narratives' actually mean to you? Does it make sense? Does it need to be broken down?

Student: I think that the 'contested narratives' aspect needs to be broken down because things become contested when you look at it from different perspectives so a lot of narratives, whether it is a primary source or a secondary source, it is written from a perspective.

TA4: I agree. Anyone want to add on to what he said?

Student: They [primary and secondary sources] are all pretty much interchangeable. They all depend on each other when historical events have been valued or not. They all depend on [whether] it is meaningful then it is not persuasive and is it a good argument? If it is not valid then it has no meaning.

In this explicit reference to Professor Majewski's first historical thinking lecture, TA1 decided the primary or secondary source discussion veered into the territory of determining whether or not a source is valid, persuasive, or meaningful. Students recalled that historical thinking involved engaging with meaningful and contested narratives and that these narratives contained a particular perspective. However, when the TA asked if the idea of a meaningful and contested narrative needed to be "broken down," he was asking if everyone in the room understood what this meant in terms of comprehension of the lecture. The student who responded to this question took the term "broken down" to mean a narrative needs to be analyzed in order to understand the author's perspective. Another student attempted to define the relationship of primary and secondary sources as "interchangeable." This same student made the point that an argument was only meaningful if its components were valid. Despite the circuitous language of this excerpt of the discussion, it held promise in being an example of the TA's attempt to incorporate the concept thus extending the career of the concept to the discussion section. He demonstrated a willingness to stretch his teaching capabilities to reinforce the historical thinking lecture and translate the concept.

Following this exchange, TA4 moved on to asking students to determine the contested narratives they will have to read during the quarter. One student answered that contested narratives exist in how America dealt with the Native Americans and westward expansion. In looking at sources within this time period, the TA emphasized that historians look at the perspective, bias, or motivation of an author in order to determine the document's validity and meaning:

TA4: Yeah, that's a really good contested narrative [how America dealt with Native Americans] ... so is one of those more valid than the other? How are we ... how do we take those narratives and assess their validity?

Student A: Kind of what was said by Professor Majewski ... you have to look at the evidence and what is known but then also understand the social nuances and values that were added at that time. The perspective of the time period is different ... from our social values and it affected certain things ... [inaudible]

TA4: So I think Student A. brings up a really good point about social norms and contentions. In my field there is a really famous article about westward expansion and Indians are not in it and it is written in 1895 and just Indians are not there. How come the histories in 2012-2013, Indians just appear where they [had previously been written out] or what is actually happening?

Student A: Well I guess that the article at the time in the 19th century ... there is more focus on progress of the nation and less of focus on who the victims or possible victims of the progress and that's the social norms of the time and their social perspective. So they have perspective on who they are then; later on in history ... that starts to see these issues.

This excerpt demonstrated two effective student contributions to the discussion where one student addressed Majewski's lecture where he talked about what makes a narrative meaningful at particular points in history. Another student, building on the TA's reference to his own field, mentioned how the use of evidence factored into development of perspective. This excerpt also showed the affirmative tone the TA used multiple times during discussion

sections where he would validate a student's comment and try to build on it. Below, the TA returned to his question about assessing the validity of primary sources and what it meant for the study of history:

TA4: What does that mean for history?

Student D: The Native Americans were a threat but not to the entire nation. They were not unified to begin with so why should we consider them to be unified and to bring it back to the point ... it brings the idea back to the point in that historians only value what was valued at the time. And then later on in 2013 we start looking back and say there were people there and there is evidence that they were there but at the time ...

TA4: I think that brings up a good point about bias ... right? These things are written. So how else does that function? Did anyone get a chance to read the Andrew Jackson piece? We're not talking about it today because I figured most people haven't read it. Did anyone have a chance to read it?

[Silence.]

TA4: So I just want you to start interrogating biases when you are reading the sources. What is this person trying to say? What is at stake for them? Why would someone say Student A brought up a good point with that. If it is economics or there are these other motivations going on. So I think that is what we are trying to get at. And we'll talk more about argument throughout the quarter.

As seen in this excerpt, a separate student referred to the idea of investigating the meaning of the narrative and the context of that narrative in a particular time period. In the final minutes of the course, the TA summarized how students should read sources, suggesting they “interrogate biases,” thus providing a rudimentary primary source analysis framework to read sources with these questions in mind: What is the person trying to say? What is at stake? What are the motivations? He ended with the idea that these questions contribute to determining an argument.

This example from TA4's discussion straddled the line between translating the concept and framing a whole discussion around it. The capabilities demonstrated showed an attuned sense to the concept of the discipline and his inclination to teach to this concept. He began a discussion to translate the concept of contested and meaningful narratives yet the ensuing discussion touched on crucial responsibilities of the historian: evaluating evidence, understanding an author's perspective or motivation, establishing validity, and understanding the context of a source (looking at omission as well as inclusion). This accidental, disciplinary framework prompted sophisticated student contributions around these ideas.

When interviewing TA4 following the quarter, he described this first concept lecture as the concept that resonated most with him:

I think the contested and competing narratives one. I think once you understand, once a student understands the history it happened but it didn't really happen the way, it is a written document that people are making choices about it. Once students understand that it opens a door into these other things like contingency, causality, continuity, change over time and stuff like that. I wasn't exactly taking notes in the lectures, it was sort of just getting the main ideas and seeing where to steer discussion in section.

TA4 confirmed or echoed what Professor Majewski stated in his own lecture about sources being documents that people made choices about with particular motivations, biases, and contexts. Yet the TA viewed this concept as one that is essential to the discipline and "opens doors" on other important issues in the field [see my analysis of TA interviews for the discussion on this reference, page 155]. In this interview, it appeared that the TA recognized this first lecture as a true threshold concept and one that once understood, leads to further understanding about the discipline. He also recognized the important of conveying this concept for students thereby demonstrating his capability for translating the concept.

Students and Concept One: Meaningful and Contested Narratives. For the student perspective of this concept, six students claimed this concept affected their thinking on the final survey. Two of the six students were from TA4's section. Neither student was a history major. Not only did they provide a response to the question, they both indicated they would apply this concept in future history courses. The final survey question was:

Name one or more of the historical thinking lectures and describe how it affected the ways in which you approach history or historical thinking. How did this lecture change your thinking? In what ways were you able to apply this new approach to your work or discussions?

The first student responded:

Before I would approach history thinking that it was just a bunch of facts and events. This lecture changed my thinking because I now see how historians view history and how events look different for every historian. I put myself in the shoes of a historian and that helped me understand the lectures.

In this excerpt, the student acknowledged that historians have unique perspectives on events in history and the student could also put himself or herself in that role. The following question on the survey asked if the TA referenced the concept in section. This student wrote, "TA4 made multiple references about historians and how each historian had a different view on domestic ideology or Lincoln's inaugural speeches."

One of these two students from TA4's section consented to an interview. Student A, in her survey, wrote that this historical thinking lecture affected her in this way, "It got me to analyze history critically and not take a simple history book's text for granted. I feel I have a better understanding of history now." In the interview, I asked her to elaborate on her statement:

I have a specific example of that. The last paper I did was about Abraham Lincoln and the slaves and "who freed the slaves?" and I never thought about it in that way. I

never thought about it in terms of how much did he really do? What's specifically did he do? What were his thoughts and how were the slaves treated at this time and this time? How did they actually [fight] for their freedom too? And I found that really interesting and I called my mom about it.

But I think it was that example was a good example of how it got me to think, like ok, what exactly did the Emancipation Proclamation do? Did it do as much as he [Lincoln] thought it did? And you know the process of how the slaves were freed specifically, like the 13th amendment and voting and I don't think I would have seen that had it not been for this whole 'historians not taking everything at its word and actually analyzing what is going on' and that is a specific example of what I thought was really cool.

In the excerpt above, this student connected the idea of "historians not taking everything at its word" and the notion of analyzing a source within its context at the time as essential for taking another look on an issue she had learned in high school. Not only did she demonstrate an understanding of the nature of examining contested narratives, she expressed this understanding through a series of questions or inquiry about the documents (Calder, 2006). Though only one student among many in the course, this student's comments demonstrated how the career of this concept traveled from professor to TA to student.

The career of this first concept, then, was inconsistent. The TAs were not instructed in their weekly meeting to incorporate this first historical thinking lecture into their discussion sections. The range of application varied from nominal reference to strong conceptual framing that exhibited important aspects of the discipline. In looking at the highest stage for this concept, TA4, represented evidence of translation of the concept in order to guide a discussion around it by asking students directly if they comprehended the concept. On the other end of the spectrum, TA5, representing the evidence of minimal reference, seemed reluctant to incorporate the historical thinking lecture into his discussions, despite saying in his interview that this concept resonated most with him. Next, I examine

how the second historical thinking lecture displayed evidence of movement through the discussion sections.

Winter 2013: Concept Two -- Historical Thinking Lecture: Analyzing Primary Sources

The application of the first concept ranged from minimal mention of the ideas to one attempt to translate the concepts for students. The second historical thinking lecture in the course focused on instructing students on specific actions when reading primary sources. The lecture was less about the epistemological foundation of the discipline and more about particular actions historians use.

It is important to note that prior to this second historical thinking lecture, the TAs handed out or emailed a primary source reading guide to their students during the first week of the quarter. This guide [Appendix F] listed a series of recommended questions students should ask when reading a primary source. Only TA1 referenced the handout in her first meeting with students. TA2 and TA4, in their first discussion sessions, did discuss aspects of questions one should ask when reading a primary source but they did so briefly (see Table #, comparing primary source analytical strategies among instructors). This is important to consider for two reasons: 1) the TAs did not know the extent to which the professor would make these historical actions explicit and 2) the professor did not know that the TAs had already discussed analyzing sources (to varying degrees) in their first discussion section meetings.

Again, the TA weekly meeting was a crucial place where communication around the direction of the course occurred. Majewski briefly explained what he was going to do in his second historical thinking lecture in that he would show video clips of himself analyzing a primary source unrelated to American history to demonstrate what it is like to approach

primary sources for the first time. He stated he would ask students iclicker questions related to the clips. However, he described the entire exercise as having “some applications to the course in a vague sort of way and then we'll move from to separate spheres ideology and domestic ideology.” He did not frame the concept of analyzing primary sources as a central component of historians work therefore the career of the concept seemed uncertain.

Professor’s Historical Thinking Lecture: Analyzing Primary Sources. Consistent with his goals to make aspects of historical thinking explicit, Professor Majewski introduced the career of concept two, analyzing primary sources, in the large lecture in week two. Majewski used video clips of himself analyzing a primary source derived from a think-aloud session (Wineburg, 1999) to uncover his own processes when analyzing sources. As part of this second historical thinking lecture, Majewski wanted students to try analyzing the same source (an ancient Roman letter) he used in the video. He interspersed a series of iclicker questions while showing video clips, and also distributed the document that he had been given for the think-aloud (a text chosen by a Roman historian and far outside of Professor Majewski’s area of expertise, American history). He explained the exercise of doing think-alouds to students:

I was given this document simply blind. And I read it aloud and gave my thoughts on the document [that] was then filmed. And so you can compare your reading strategy of how you approach the document with how I do it. Ok? ... Read it, see what you make of it. No questions, no context, nothing. Just go ahead and start reading and analyzing the document.

He wanted to students to read the document for five minutes before answering an iclicker question. The question pertained to what students noted first about the primary source.

Through this resource and the amount of time devoted to the primary source analysis exercise (33 of 50 minutes) where he emphasized the steps to take when confronted with a

primary source for the first time (building on the element of uncertainty he referenced in his first lecture), clues historians use to place the document in context (date, author, graphical layout), being comfortable with confusion, and understanding how the document contributes to a historian’s perspective.

Professor Majewski then asked students what they noticed first about the document. The results:

50%	A. Graphical Layout
30%	B. Date
12%	C. Author
10%	D. Other

The professor quickly asked if a student could tell him what they thought if they entered “D.” One student noticed that it had been translated from the Latin.

Professor Majewski described two initial steps for analyzing a primary source, reminding students that their analysis contributed to a historical narrative. The first step was to look at the date. “When historians physically read a primary document, the first thing we are looking for is date. So remember we tend to think in terms of narrative. When is something written and when is it produced so the instinct of historians is to go with the date and try to place it within their own narrative.” The second step, as he described it, is to determine the author and his/her motivation in writing the document. “Especially here in 17B, one of the things that you want to look at right away is who is producing this document as well as when are they producing it.”

After this brief discussion, he then showed students the first video clip where he encountered the source for the first time. Following the clip, the professor elaborated on how he started with the date and how he was trying to figure out what it meant. He confessed that he did not know what “C.E.” meant when he was doing the think-aloud. “I was also thinking that I was a little bit embarrassed to say this but I didn't know what C.E. meant ... and now it means ‘common era’ that it means a long, long time ago. And trying to place it in a narrative context [was what] I was trying to do.” Normally, this would be an element within a think-aloud, verbal wondering about what was puzzling. However, he did not reveal this in the video. He went on to explain, “I don't know Latin, I wasn't sure how to say the author's name, ... so my mind glossed over it. And I went to the narrative and the date, title, trying to figure things out that way.” He presented these as clues that historians use often to determine information about the document.

To emphasize one of his central themes associated with the feeling of uncertainty in history, he coupled the next iclicker question about what was most confusing about the document, with a clip showing his confusion about a passage in the source. Roughly sixty percent of the students thought that what was most confusing about the document was “not knowing the purpose of the document.” Based on this response, he showed another clip wherein his own confusion in the analytical process factored into his interpretation of the document. He mentioned in the video that if he had been wrong about the author of the passage then his interpretation would be incorrect.

The professor used this clip to emphasize that struggling with confusion was also part of the historian's task. “There are going to be moments of chaos and confusion where you're reading and you think you know what is going on and then suddenly you doubt what's going

on and you're wondering if you can make any sense of this at all. And the thing is to be comfortable with that sense of chaos and confusion.” He called this the “name of the game” when it comes to analyzing primary documents and he discussed the necessity of re-reading the document to work through this feeling of confusion.

While re-reading a document or slowing down in the analysis process appeared as an historian’s strategy, his discussion of being comfortable with confusion spoke to the affective component of historical thinking. When discussing the struggle of making sense of a document, he encouraged students to not “be worried about being confused by the chaos but embrace it. Part of the process, this is learning and this is how learning takes place.” In bringing “previous knowledge” to a primary source reading, Majewski explained that it was necessary to situate the source within your own understanding first in order to establish connections before situating the document in its historical context:

We give meaning to the document, our own individual meaning, while seeking to put it into its proper historical context. So we want to be true for example, when we're reading something that Abraham Lincoln wrote about what Abraham Lincoln *meant*. But we also incorporate at the same time our own individual meaning significant to the document and it is an intersection of those two that makes life interesting for the historian.

That's what being a historian is all about. It is trying to understand all of the connections with what's been written, who wrote it, what was their underlying purpose, how does that fit in with that time period.

As he built on this list of historians’ strategies, he also returned to the concept lecture from the previous week about meaningful narratives and asking questions of those narratives that situate them within their own time period. “You want to put a [primary document] in a specific historical context but at the same time you want to draw out larger meanings so you can make connections to the document that are your own. How you balance that is really

important.” This led to the next video clip where he picked up on a word in the text to discuss what it meant in the context of Ancient Rome but also what it meant to him as an Americanist historian:

So we can see the emperor is using the term ‘commonweal.’ What the emperor is worried about is that the Christians were forming their own political society and that undermines the common good. And it is that same notion of the common good and working for the public good that motivates a lot of nineteenth century political ideology and rhetoric. And that's where the language of republicanism comes from and in fact people who talked about republicanism often drew on sources from ancient Rome.

He framed the connection he made in the video, using specific passages as evidence, applying to his own individual, scholarly perspective on the source and what this source offered to a US Historian; he emphasized that it is important to balance the act of interpretation between an individual perspective and establishing a specific historical context. To gain perspective, Professor Majewski justified the discussion sections as the place where students practice developing their own perspective while hearing from others

Professor Majewski decided to use his portion of the video to model for students what to look for when encountering a primary source. The strategies he used in the video were:

- 1) Look at Date (When)
- 2) Who is the author?
- 3) What are his/her motivations?
- 3) What about the document do you not understand?
- 4) What is the context of this document?

The strategies espoused here at the end of lecture correlated loosely with what TA1, TA2, TA4 used in class the week prior to the analyzing primary sources lecture:

<i>Table 9. Comparison of primary source analysis strategies for professor and TAs.</i>				
Professor	TA1	TA2	TA4	TA5

<ul style="list-style-type: none"> • Look at Date (When) • Who is the author? • What are his/her motivations? • What about the document do you not understand? • What is the context of this document? 	<ul style="list-style-type: none"> • Who? • What? • When? • Where? • Why? 	<ul style="list-style-type: none"> • Where is it from? • Who it is from? • Who it is to? • Why are they writing it? • When? 	<ul style="list-style-type: none"> • What is the person trying to say? • What is at stake? • What are the motivations? 	<p>No deliberate mention of strategies to students in class; sent the primary source guide via email</p>
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The most notable difference between the TAs questions was Professor Majewski’s question, “What about the document do you not understand?” This question afforded the opportunity for students to articulate what they do not know thus allowing for historical uncertainty in the analytical process.

This one concept lecture was central and important in relation to the other concept lectures. In order to understand what contested narratives meant, how to enact historical empathy and how to determine the relevance of the source to one’s argument, these analytical steps represented key central actions of historians. They also presented a broader range in which to see where these actions surface in the TA discussion sections. The career of this concept (and its components) traveled further to TAs and students due to the convergence around the strategies of the professor and the TA strategies for analyzing sources from the first week of discussion meetings.

Winter 2013: Concept Two in TA Discussions

Table 10. Concept Two and the Stages of Uptake among TAs

	TA Stage 1: None	TA Stage 2: Minimal	TA Stage 3: Translation	TA Stage 4: Frame
Concept 2: Analyzing Primary Sources Lecture			TA1	
				TA2
				TA4
		TA5		

As I mentioned earlier, a discrepancy existed between the time the TAs discussed primary source analysis in the discussion sections and the timing of Majewski’s lecture. This is important to consider for two reasons: 1) the TAs did not know the extent to which the professor would make these historical actions explicit and 2) the professor did not know that the TAs had already discussed primary sources and ways to analyze them (to varying degrees) in their first discussion section meetings. The following brief descriptions of what each TA did reflected moments where the TAs’ strategies for discussing primary source analysis somewhat align with the professor’s. The professor’s strategies from the lecture focus on a series of questions about a document that led to establishing the context of the document.

TA Stage 1: Minimal Reference to primary source analysis. TA5 limited the extension of the concept of primary source analysis in his discussion. TA5 started his discussion with a short writing assignment asking students the following question, “We’re talking about domestic ideology. We presented this as a shift in American society in the way that women talked about roles in society. My question to you is why this shift now and why

is this happening at this specific moment?” After students reflected on their own for a minute, he asked them to report out their thoughts in order to “frame our discussion of the documents and see [how they are] reflected documented in these documents.” In this instance, TA5 started with establishing the context for the documents in order to review the assigned readings for the week with the intent for students to draw connections from the readings to the overall context within which they were written. The focus on context corresponded to one of Professor Majewski’s strategies from lecture, however the discussion that ensued did not convey the same sense of analytical attunement described in the lecture.

There was one moment where the TA asked a student to pick out specific evidence from the text in order to substantiate her perspective on how the document connected with the larger question of context. In this instance, TA5 used only the second move that reflected the historical thinking action of finding evidence in a text to support an argument. Apart from that one instance, TA5 stuck to generic discussion questions such as: “What do you guys think?” “What else?” “What do you guys make of this document?” Contrary to this TA’s generic facilitation style, he ended the class with specific questions he wanted them to consider when reading *The Narrative of the Life of Frederick Douglass* the following week:

Look at the book critically and say ‘how does everything in here actually [support a] subtle or not so subtle argument against slavery... Who's he appealing to? Who's he writing to? Who's he trying to persuade with this and what kind of rhetorical strategies is he using to do so? So that will be the way we tackle Douglass.

In the excerpt above, the TA demonstrated his knowledge of crucial questions to ask of the source such as audience, persuasion, and motivation. By listing these questions, TA5 showed that he understood the questions Professor Majewski referenced in his lecture. He also indicated that he understood they would be pertinent to this particular primary source, yet he did not apply the same questions to the primary sources within this discussion. The career of

the concept of analyzing primary sources, representing central actions of the discipline, surfaced minimally and inconsistently in this discussion.

During his post-quarter interview, I asked him about the primary sources concept lecture, he replied:

I think for writing, you know, that's one of the really important things that I emphasize and I think all the TA's emphasize for writing, um, a history paper is interpretation of primary sources ... analysis of primary sources. A student's not going to do well on a paper in my class if they don't have some sort of primary source analysis. So yes, I think that's very important.

In the statement above, TA5 reiterated the importance of the analysis and interpretation of sources. For TA5, writing in history, was a theme he returned to regularly in his interview. In his own definition of what contributed to good writing above, he focused on the ability to analyze sources. He linked analysis to interpretation to writing yet he did not make this linkage clear in this discussion section. The TA displayed inconsistencies in his capabilities of framing and guiding students between what he understood as pertinent analytical questions to the actuality of prompts he used within this discussion.

TA Stage 3: Translation of primary source analysis concept. TA1 started her discussion in the same fashion as TA5. Where TA5 fell short in connecting the analysis of sources to the context of the time period, TA1 successfully led the students in analyzing sources and connecting them with the overall context. This difference was apparent from the beginning of the discussion section. TA1 started her discussion with establishing a context by listing elements of the context on the board, and then going into a discussion of individual documents via group work. Each group analyzed their documents with the primary source questions she introduced in her first class session (Who? What? Why? Where? and When?). So while she was not framing the discussion within the professor's language, she was

reinforcing an analytical process that she introduced in the first week loosely following the primary source reading guide she handed out to students. It was not Majewski's primary source analysis framework but she remained consistent to translating her own framework for tackling the primary sources. The intention of the concept of utilizing a set of actions to address primary sources did extend the career of the concept to this discussion.

TA Stage 4: Framing the concept. TA5 diminished the career of the concept, TA1 reinforced the concept through her own working framework that she established in the first week. TA2 and TA4 established a similar pattern to the other TAs in terms of placing importance on establishing the historical context through the analytical reading process. TA2, despite starting the discussion in a similar way, incorporated the primary source analysis concept more fully than TA1 and TA5. TA2 listed the definitions of the course themes to use as a foundation from which to view the individual documents. He differed slightly in that he first asked for students' prior knowledge on the topic for that week (domestic ideology). Once he received the answers from the six of eighteen students who had heard of the ideology, then he opened the discussion to the other students. Like TA1 and TA5, he utilized group work in the same manner with each group analyzing one source. The only difference was that he used Professor Majewski's concept lecture as the guide to the small group work:

Professor Majewski ... he just jumped into the document and started trying to get to what it meant, what the purpose was, who it was, when it was. Just jump into these documents and start talking about what they mean and what their origin is. And as you get into that I'm going to walk around and give you some more specific questions about your specific document.

In the excerpt above, the TA referenced the video of Majewski analyzing sources. He used action verbs "jump into" to reinforce the idea that students could do this too. To supplement Professor Majewski's analytical questions, TA2 had printed out specific questions pertaining

to the documents. As students worked in groups, he circulated the room, guiding students through the discussion. For example, when talking to one group, he asked them pointedly about what they knew of the author, “Sarah Grimke ... do you have a sense of who she is? Do you have a sense of her origin?” He helped students parse out why her origins mattered to her argument. “Keep in mind most of this other stuff [other primary sources under consideration] is written by and for this new emerging middle class and [this author] is separate from that ... I really want you to get to the bottom of what her critique of this is and what is radical [about it], ok?” After ten minutes, he then scrambled the groups so that the groups were comprised of one student from each document they had reviewed. Now he asked them to:

Discuss with your partners what you've learned in your [past] group and what your document is about and then try to work together to use each other's knowledge to come up with a new thing to say about domestic ideology. Figure out something that challenges it, supports it, problematizes it, clarifies it, anything like that because you each have a piece of knowledge about this story that you can share with the others.

In the excerpt above, the TA encouraged students to challenge their previous small group discussions with new questions that might contest earlier findings. Not only did he encourage students to analyze the sources further, he encouraged them to do so with a sharper analytical lens (“challenge,” “support,” “problematize”). In this instance, he asked students to take another look at the documents in order to counter what the ideology was actually about. In addition, he viewed the documents as telling a story, a narrative as Majewski would call it, and it was the students’ responsibility to piece together the story. I was fortunate to be in hearing range of one group where the group exchanged questions that had stumped them. One student explained that his previous group could not figure out how a group of women came together to form the Seneca Falls Convention. This led to further

questions about the extent of women's education at that time and how far could women go in school before being relegated to the "women's sphere." The TA listened to the group for a minute or two before encouraging them to start making connections among the documents. One of the students then asked about the dates of each document in an attempt to place Frederick Douglass' book within the evolution of the topic of domestic ideology. Before they were able to piece this chronological narrative together, the TA called the class back together to share insights across the room about each document. As each group called out their findings from the discussion, the TA summarized their points effectively while reminding students of the historical significance of each document. The career of the primary source analysis concept extended to this discussion in the TA's rhythm for looking at context, analyzing sources, and returning to the larger context in order to analyze sources closely again.

Like TA2, TA4 focused on placing each document within the larger context yet he reversed the order of the discussion to analyze the individual sources first and discuss the historical context afterwards. "We're going to start really basic with each document; sort of a service level [approach] and then have a discussion about reform generally and also the role of women in the 1830s-ish area." He established the approximate date of the readings, doing what Professor Majewski said to do first. Then he launched into the first reading asking students about the author and the motivation of the piece, which he did for each subsequent piece. He used probing questions to students' responses ("Why? Can you expand on that?"), in addition to asking for more specifics from the text when a student response was vague (there were four instances in the transcript where he asked for specific references).

Just as Majewski discussed looking for clues within a text in his lecture, TA4

established the practice of returning to the text following an insightful or provocative comment from students (he also returned to the text when there was total silence in the room). In essence, he modeled for students the back-and-forth of making a claim about a text while understanding the specific points in that text to support that claim. He did this twice in the discussion and one student also referenced a particular passage. When she referenced this passage, the TA affirmed her selection and labeled it as the argument of the piece, using terminology specific to historical thinking as opposed to the more generic terms of other TAs who used “the gist” or “what it’s about.” TA4 also stressed looking at authors’ motivations particularly when there was a clear audience in mind, particularly when they started reading the *The Narrative of the Life of Frederick Douglass*:

One of the things that I want to impress on you is that this is a document he wrote and constructed with specific motivations. If we keep the rhetoric of the Seneca Falls Convention borrowing language from Declaration of Independence, we can start to think about Douglass’ narrative as being constructed.

After a brief discussion of the first two chapters, TA4 returned to the question of why Douglass wrote his narrative and the discussion quickly turned toward whether or not it was Abolitionist propaganda. One student responded:

I also think it finds its legitimacy in the fact that, it is so relatable, guaranteed that the people who read this had never gone through this their whole life, ... it shook people that he was separated from his mother, doesn't know his father, and forced to sleeping on the ground ... they could understand but never lived through it so I feel that was able to touch people’s hearts.

The TA then took this response and moved beyond the documents to the question of context. He asked two questions to force students to establish the context of this source and the other sources discussed during that day: 1) does [this audience] tell us something about 19th

century US generally? Is slavery something you can't understand the 19th century without understanding slavery? Why do we as historians read it?

As a parting question, he asked students, "Why did we read these things together?" forcing them to consider the context and how the readings complement their understanding of this time period. This differed from the other TAs who established the context for students; here the TA wanted the students to draw the comparisons. Two students discussed the concept of change that the TA then incorporated into his own summary about reform movements. In terms of Majewski's concept lecture, this TA incorporated all of the questions the professor outlined even though this particular TA stressed motivation and bias more, thus incorporating the concept fully into this discussion. The only question he did not use was asking students what they did not know about the document.

Students and Analyzing Primary Sources. Five students wrote about how this concept affected their thinking on the final survey (n=50). One of the five students from TA2's section wrote, "The lecture that helped me out the most when reading [primary sources] was Lecture #2. It gave me different ways to approach the material so it would be easier for me to understand what was going on." The related question asked if the TA referenced the lecture in discussion where the student confirmed, "We discussed the different ways to approach primary sources like the professor did in lecture."

Interview responses surrounding this concept came from three students: two students from TA1's section (Student C and Student D) and one student from TA4 (Student A). Both students from TA1's section did not find Majewski's lecture helpful for two distinct reasons: Student D was a history major who understood primary source analysis already and Student C felt it was too detailed. In talking with the history major about the video, he thought it was

obvious to look for the author first and then the document's meaning would stem from that, "I just didn't like what he said on the video because you already know the author and you know, what the document's saying to you." Furthermore, he stated this was not an area of difficulty for him since he learned it in high school:

That's the kind of stuff I heard before but it's not really anything like I'm still having trouble reading the historical documents. And then essentially what he just said was what I learned back in AP World History. I thought he would go more into you know, like backgrounds of the authors and like more context I guess.

In the excerpt above, Student D represented the view that if you were a history major, this "stuff" should be known already. Yet, he was curious to know more about the document and its context, indicating that he was waiting for more to be revealed about the document through the exercise. For him, the exercise could have gone more in depth with the analysis.

On the other hand, Student C, determined the video clips were too in-depth. In the final survey, Student C responded to the question of which lecture affected his thinking most by saying, "the second lecture helped me start thinking critically about how to approach analyzing a historical document" yet he backtracked on this statement when I asked him to elaborate on it during the interview. I reminded him of the response he wrote on the final survey and then he said:

It was only somewhat helpful because it was really in-depth and it was hard for me to understand where he was going and it was very high-quality analyzing. It was hard for me to tell myself I could do the same thing, I guess.

Student C, an English and Sociology major, felt overwhelmed by the video in terms of his ability to replicate those strategies. His response to the next question refuted this idea. I asked him if anything could have been done differently in the video to make the analytical process more explicit. He responded, "I feel like, just for studying purposes, I just needed to see certain quotes and certain main ideas within there. I just need to know main points for

each document because there are so many documents that we need to know.” This comment was similar to two other instances in the interview where Student C indicated his need to only see pertinent information about readings. This approach to the course entailed a focus on ascertaining the main content in order to study for exams. These two students’ dispositions presented problematic barriers for the career of the concept to have an impact on their thinking.

Student A, from TA4’s section, was the only student in the interviews to comment on both the use of the professor’s videos in class and how it connected to what her TA did in class. When asked on the final survey if the TA referenced this lecture in section, she wrote, “He always brings up how we would approach the reading for the week as a historian.” She commented on analyzing primary sources as being an influential concept on her own thinking:

Where Prof Majewski is on video analyzing the primary sources ... it was cool how he showed that he broke down the analyzing of the primary source and breaking down the context of time and taking everything into the context of when it was written and what it could mean now.

That stuff is like really interesting to me about history is kind of thinking about what did they mean back then and how does that apply to us now and how can we learn from it now. So that one stood out to me the most.

This student, in the statement above, demonstrated her understanding of Majewski’s set of actions and how it connected to meaningful narratives in history. She also connected

Professor Majewski’s strategies for analyzing sources to TA4’s strategies:

[TA4] would always bring up or almost always bring up what does this mean from the primary source standpoint from the author's standpoint... just kind of like always being forced to be taken back to that and not getting too sucked into the documents about what the words mean.

He always took a step back and looked at what it meant and we almost always did that in section and that helped the most I think. It got me to make the habit of thinking about that and primary source that I read or read now.

The student referred to the methods of the TA, which were informed by the professor's lecture, as methods she used during the class and in the history class she was taking at the time of the interview in spring quarter 2013 (History 4C). Stating that she now thought of this as a "habit" demonstrated a movement of the career of this concept beyond the professor and the TA as a set of actions she used in subsequent courses.

In conclusion, evidence existed of the career of the analyzing primary sources concept traveling from professor to TA to student. Each TA, to varying degrees through their teaching, recognized the role of establishing a context in which to analyze the documents, an implicit connection they made to Majewski's lecture. Through their strategies, each TA attempted to connect each source with the overall context. TA5 started off with establishing context but did not employ primary source analysis strategies to connect the source to the context. TA1 remained consistent to the generic primary source reading guide she handed out the first week. TA2 and TA4 framed the discussion in a way that established a context while giving students the ability to practice analyzing documents in order to help them make their own connections. This type of framing appeared to have an impact on Student A who recognized this as a consistent practice in TA4's discussion sections. The role of practicing the concepts played a part in extending the career of the concept from professor to student. These primary source analysis skills students were practicing would be essential for understanding the next lecture on historical empathy.

Winter 2013: Concept Three -- Historical Thinking Lecture: Historical Empathy

Professor's Historical Thinking Lecture. The concept of historical empathy most closely identified with Majewski's September 2012 thinking on the complex relationship of the past and the present when he expressed concern about the "Goldilocks" interpretation of the past or the condition of "presentism" in analyzing primary sources. Presentism, he explained, was the importance of not applying a presentist lens to historical document; a historian needs to understand the document within its context at the time. In thinking about the part of his course where this concept applied most, Majewski coupled this lecture with the unit on slave resistance where the chosen primary sources of historical actors at the time would prove difficult to analyze if students (and TAs) were not able to shed their presentist lens. The required readings for that week comprised of pro-slavery arguments that afforded many opportunities for TAs and students to practice understanding the context of the particular author even if the argument is abhorrent in present terms.

Professor Majewski introduced the concept of historical empathy during week three of the course at the beginning of a series of lectures on slavery and slave resistance. He combined iclickers and lecture to describe this concept. At the start of the lecture, the professor reminded students that the job of a historian is to "make meaningful, significant narratives. So what I have in mind here is [the question,] to make a narrative about 19th century meaningful, do we also have to cast some type of moral judgment?" He projected the question on the screen and students, with clickers in hand, responded to the following true-or-false question: "To make narratives meaningful, we have to judge historical participants by our moral standards." The answers were either True ("To not judge leads to moral relativism.") or False ("We want to learn about context in which people operated and not import our own moral sensibilities.")

In response to this question, 85% (291 of 342, according to the iclicker results) of the students present in lecture that day marked true, leading Majewski to deduce that “the vast majority of you are uncomfortable with making historical judgments.” In this third concept lecture, the themes of discomfort, struggle, or potential confusion surfaced in a discussion involving threshold concepts in history. Majewski connected the historical thinking lecture on empathy to his opening lecture on meaningful and contested narratives. He drew the connection in order to emphasize the type of thinking involved in creating a historical narrative. He also emphasized the role of context in historical thinking and the ability to create a context in which to analyze the primary sources at hand, particularly the historical actors involved with slavery in the South. Next, he projected his definition of historical empathy through three bullet points:

- Trying to understand the thoughts, beliefs, and actions of others.
- Empathy does not mean agreement.
- Understanding others as humans, rather than as victims or heroes.

In explaining his first bullet point about what a historian tries to do in showing empathy, he cautioned,

keep in mind that empathy does not mean that you agree with that person. It means that you simply are trying to understand how they thought, what were their options, what was their viewpoint, how did they justify their actions. And so to be empathetic as an historian you have to be willing to put yourself in the shoes of lots of different people.

During this explanation of historical empathy, Majewski also mentioned that this was considered an act of “imagination” on the part of a historian. In order to “put yourself in the shoes” of people in the past, the example he gave was the Cherokee Indian removal in U.S. westward expansion. The job of the historian would be to look at the issue from the

perspective of a member of the Cherokee tribe or from the perspective of a middle class social reformer. The final point stressed the need to read about historical actors as humans and not as characters in a novel – they were neither heroes nor villains, simply human beings who made decisions based on the knowledge and resources at hand. He concluded his discussion of historical empathy by emphasizing how important this is when it comes to reading primary sources related to slavery:

As historians, we want to understand the actions of others as human beings and we don't want to portray everyone as part of a group as heroes or portray them as victims, but we want the fullness of human experience. How they approach their world and often a very complex world from their perspective: their thoughts, their outlook, [and] their actions. And this is why empathy is really, really crucial. And why empathy of understanding the motivations of historical actors is really important.

In the excerpt above, Majewski stressed that empathy allowed historians to understand the context of historical actors in the service of creating a narrative that interprets the meaning of the events of the time. He connected this point to acts of resistance in slavery that might have appeared as complicit behavior within the institution of slavery. He explained that forms of resistance existed within this complicit behavior. While this is not a fully explained example, the underlying assumption was highlighting for students that there was more to the story when it came to reading slave narratives. With the given readings that week, students would have to utilize their primary source analysis skills to recognize acts of resistance and discuss agency among African-Americans and abolitionists.

These last two excerpts from the professor's lecture on that day connected the concept of historical empathy back to the larger definition of history as a series of meaningful and contested narratives (from the first concept lecture). The purpose of historical empathy afforded historians to not only view historical actors' motivations but to

consider the context or “world” in which the actors lived. After completing the definition of historical empathy and the few examples of it, the professor finished discussing this historical thinking concept and moved on to the content portion of the lecture discussing slave resistance.

Prior to the end of class, the professor posed another iclicker question in tandem to an audio-recording. He handed out an excerpt from an interview with an ex-slave named Robert Glenn[1]. In addition, he played an audio-recording of the actor James Earl Jones reading the part of the Glenn. In the interview (conducted in the 1930s), Robert Glenn described being sold as a slave as a child and separated from his mother and father to move to a plantation in Kentucky. Following the playing of this recording, the professor asked students, “as a historian, what surprised you in this account?” Part of the account involved Robert Glenn remembering being next to two white women who talked about the sadness of “slave business.” One student remarked that he was surprised that white women were sympathetic to the child’s plight. The professor then connected this remark to the possibility that this represented many Southerner’s views on the morality of slavery yet this moral dilemma did not prevent the end of slavery.

Another part of the story involved the child’s father attempting to buy him back from the master. One student in the audience questioned how it was possible for a slave to earn income. The professor described the economic realities of slavery where skilled slaves earned money as contractors for the plantation. Another student remarked on Glenn’s sense of self and identity through knowing his birth date. The professor acknowledged this was true but it also led him to prompt the students to think about the role of memory in this ex-

slave's account. He advised this is another aspect historians need to take into account when listening or reading primary sources such as this one.

Based on this four-minute audio recording, students listened to a first-hand account of slavery in order to situate it within the context of the perspectives of white Southerners and the economic nature of the institution of slavery. He asked students another iclicker question, "what most rings true in terms of how we should interpret the significance of this story? What is the main lesson that historians should take from the Robert Glenn story?"

The results showed that students' responses were almost evenly divided with a slight majority going to answer "C," that slaves continued to have strong family ties in the face of interstate slave trade. Despite students' responses, the professor explained that there were really no right or wrong answers to this question; all responses were plausible when looking at slave resistance. These responses represented various perspectives one could have had on slave resistance if students were to consider historical empathy and the act of "being an historian is having that interpretive lens and ... part of these interpretations [involves] put[ting] yourself in the various participants." The idea of having no right answer played into this historian's responsibility to analyze sources and make conclusions based on what evidence the historian decided to use.

His final iclicker question ended the class with thinking about slavery as a "negotiated relationship," a contested argument proposed by prominent historian, Ira Berlin. He asked students if they agreed with the following statement, "Slavery was in many respects a 'negotiated' relationship between the enslaved and their masters." The possible responses were False ("Slavery is premised on power; masters did not need to negotiate!") and True ("However great, the power of the master was never absolute.")

The results surprised the professor in that the class was evenly divided in their responses. The professor remarked, “in the past version of History 17B, people have overwhelming said false. What I want to convey about negotiation does not mean that power is equal and in some ways it is absolutely true.” He further explained that the power dynamic involved violence on the part of masters and the threat to not work on the part of slaves. Slaves not working would hinder the master’s profits. “It is a card, however hard it is to play, that slaves had.” Through this lecture, Majewski methodically explained the role of historical empathy as an important concept to apply when approaching the readings for the next two weeks of the course. This concept lecture differed from the previous two in that the professor wove in content for the week with the main points from the threshold concept lecture. He referenced a question about Lincoln in the first lecture; yet in the second lecture he analyzed a text from a different historical period. This lecture referred directly to the readings at hand and provided a larger context within to look at the documents in discussion sections. The time spent on explaining the concept correlated to the importance of ensuring the career of this concept would travel to TAs and students.

Winter 2013: Concept Three in TA Discussions

Table 11. Concept Three and the Stages of Uptake Among TAs

	Stage 1: None	Stage 2: Minimal	Stage 3: Translation	Stage 4: Frame
Concept 3: Historical Thinking: Historical Empathy				TA1
			TA4	
	TA5			

Note: TA2’s discussion section for this week did not connect to this concept.

In this lecture, the professor outlined or modeled how a historian should approach this complex part of American history, mainly avoiding the tendency to view sources through a present-day lens, through what he defined as the threshold concept of “historical empathy.” The following excerpts show how the TAs continued the application of historical empathy in their own discussions. Their approaches vary from a direct application that framed the entire discussion to virtually no reference to empathy at all either in a remark or in a question to students. I will focus on TA1, TA4, and TA5 as TA2 chose this week to discuss writing thesis statements with his students (this will be discussed in the next section).

TA Stage 1: No mention of the concept. Again, TA5 demonstrated little involvement in extending the career of the concept to his own discussion section. In TA5’s discussion, there were three key moments that indicated this could have been a troublesome concept for the TA to incorporate into a discussion. Given the way Professor Majewski ended his concept lecture with an emphasis on multiple perspectives and the idea that there was not a right or wrong answer, TA5 led his discussion from an “either/or” or an “agree/disagree” framework. This particular discussion style stultified student responses to the minimal amount of analytical guidance he was providing through the documents.

From his opening statement, TA5 seemed to ignore Majewski’s historical empathy tactic of not creating heroes or villains out of the historical actors. TA5 opened the discussion with this statement:

I want to begin with a first broad question. Let’s respond to each of these documents on a moral level: who are the good guys and who are the bad guys? So let’s just start in on whatever one anyone wants to start with (lists authors) ... So who wants to say anything about any of these people?

The above excerpt showed the first mention of looking at these documents from a moral standpoint. It was a vague direction that was not substantiated or explained thoroughly in the ensuing discussion via follow-up questions. Not only did he draw a distinction between the historical actors as good or bad, he encouraged students to begin the discussion based on any of the documents, thus removing the chronological context from the table. His explanation of the sources themselves were useful in helping students understand the author's argument; but situating them in a context and viewing them as they existed in their time were not evident strategies in his discussion facilitation. Another moment of ambiguity involved a student who drew connections among the readings about the North's complicity in the slave trade:

Student A: Another thing is the north, [is saying] we are not part of slavery, [but] they are still part of it and the main source of cotton is brought into mills in north

TA5: They are complicit in it as well? Is this the point that Fitzhugh is making in his document?

Student A: I'm making the connections from other readings

TA5: Let's say then, bringing our morals into play here, what do you say? How do you approach this argument? Do you agree with what he is saying? Is this morally repugnant?

Student B: Slaves got fed and stuff like that by their masters and the mill workers got minimum wages and in that sense they got more freedom.

TA5: So you don't agree ...

Student B: Um, yeah.

TA5: In other words, you are saying this guy is full of shit?

TA5 resorted to prompting students to agree or disagree with the source using questions intended for yes or no answers. He steered the direction towards understanding the source's argument but did not allow time for the student to articulate her claim. Student B. offered evidence from the source in question to highlight what complicated argument of this author yet the TA pursued the agree/disagree question. As in his opening discussion section, TA5 used generic discussion moves in guiding the discussion yet (e.g., "What do you guys say?" "Do you agree?"). While his mention of moral values were consistently vague, it appeared he encouraged students to apply presentist views on the source when that was the opposite of what Professor Majewski espoused in his lecture. These three instances showed problematic misinterpretations of the concept thus preventing the concept of historical empathy to even enter the conversation. Not only did the career of the concept of historical empathy not surface here, it appeared to be misinterpreted by the TA in terms of the discussion on values.

TA Stage 3: Translation to Framing of Historical Empathy. Just as TA1 showed signs of struggling with this concept, TA4, through various efforts, struggled to extend this concept from what Majewski stated and how he chose to address it. TA4's struggle, however, yielded to a productive conversation towards the end showing the potential troublesome nature (Perkins, 2006) of this particular concept and its application to a discussion section. TA4's discussion sorted into three phases. First, he encountered a difficult twelve-minute discussion on presentism where students' responses led the TA to adopt a sarcastic tone. Second, he engaged students in a thorough analysis of the sources consistently returning to the text to direct the conversation and asking repeated questions about the

argument and audience of the author. Third, he returned to the difficult topic of presentism to allow students to review or renew what they had discussed at the beginning of class.

In the first three minutes of the first phase of the discussion, TA4 asked students to discuss what it meant to take a presentist perspective on the past. Two students stated that historians should not include their “judgment” or “opinion” when reporting the facts. This led the TA to ask if, as historians, they should approach the documents with a “blank slate.” One student responded that this is impossible while another student responded that, as students, they could bring their own values to the reading of the primary source but historians should not do so. TA4 retorted, “So does that mean that a historian is a chronicler, just the facts man?” The students replied, “I think it would be better that way.” This sparked a sarcastic response (the first of three) from the TA as they began looking at the documents in chronological order.

No one thinks historians should make judgments?

[seven-second silence]

Ok, so ... judgment-free people, *which is everyone*, how did you approach the George Fitzhugh reading? It's document 6. Just basic stuff, what is Fitzhugh saying here?

One student responded with a specific passage of the reading as evidence of this author's argument. TA4 affirmed her selection of the passage then asked:

He's talking about people in the north, so 'respectable way of living is to make other people work for you' ... he's being ironic about what he sees as the northern slave labor ... how does that work? How does ...[for] the *withholding judgment people, or everyone, or the people who do not make judgments*, how do we deal with something like this?

The TA appeared to still be bothered by the conversation just minutes prior. One student who had been a part of the introductory discussion replied:

You see the way they rationalize what it was they were doing which the

stuff he talked about for slaves was a ridiculous thing, saying that slaves had it better than factory workers in the north, although I have a certain bias with agreeing with him about the factory workers thing, it was not as bad as actual slaves.

This student attempted to acknowledge that what they were reading was one author's way to rationalize Southern slavery, yet the student's presentist view ("ridiculous thing"; "I have bias") had him moving back-and-forth on the issue of agreeing with the author instead of weighing the argument, evidence, or perspective. The TA did not respond sarcastically to this student but instead asked him to refer back to the same passage to reread another aspect of the author's argument while asking, "So how does this argument work? On what grounds is he justifying slavery here?" The TA was trying to prompt students to identify the author's economic justification for slavery, particularly the author's stance that he profited from slavery. While referring back to the same passage once more, he asked his last sarcastic question, calling out one of the students in particular, "So he's talking about the wealth of white slave owners there. So, [is this] a moral argument for slavery? Unjudgmental people, like Student S., does that get in your head?" One student responded to this (not the student the TA provoked) with an attempt to view the author's stance as a moral one. The TA decided at this point to move on to the next text moving into the second phase of the discussion.

For the next twenty minutes, he prompted students to look for arguments, to identify the audience, and to question the degree of persuasion for the particular audience. It was as if the first twelve minutes had not occurred as he delved into the primary sources. The TA asked eight questions related to arguments ("what does he use to justify his argument for censorship of the mail?" "Is this similar to other arguments you have heard for state's

rights?"); three questions related to the audience ("Let's talk about audience" "In Kendal, Fitzbugh, and Seward, who are they speaking to? Or who would find these arguments effective?"); and there were two questions about the level of persuasion ("Does this kind of argument allow people to buy in to slavery as a viable ideology?"). The final comment in this phase of the discussion came from a student who talked about the reasons for the Civil War; he acknowledged there might have been economic reasons but he argued that the South's way of life had been threatened.

In the final fifteen minutes, the TA posed this question:

Going back to the larger question about that I started off with about values and judgments in history, how do you write or read about slavery? Is slavery an exception to value-neutral history? What do we ... just tell the story and there is George Fitzhugh and there's Frederick Douglass and then the past is complicated and murky? *I'm asking how do we approach these 5 documents as historians?*

After fifteen minutes of a thorough analysis of the primary sources that ensued after the confusing introduction, the TA returned to the original issue of judgment in history.

However, at this juncture, and in the way he referred to the students as historians, it appeared that the class was in a better position to answer this question than they had been at the beginning of class. Another question he posed during this phase of the class forced students to consider the historical context: "Putting ourselves in the mindset of the 1840s, 30s, 50s-- whose arguments are most effective here? Helpern's, Seward's, Kendal's or Fitzhugh's? They all appeal to different things." This question was even more specific in that it asked students to evaluate the documents versus solely discussing the issue of presentism in history.

It is possible that the primary source analysis neutralized the discussion to allow students to fully understand what the TA may have been asking at the beginning of class. A few of the student excerpts below indicate the level of students' awareness of their own tendency to

apply presentist views on slavery based on their prior knowledge while demonstrating their understanding of the argument and the particular context of the time:

Student A: It's hard to be open-minded because you've been taught that ever since you learned about the Underground Railroad that slavery is just inherently wrong, morally corrupt, and there is no bright side to it whatsoever. It was hard to read Fitzhugh [since] we're taught that factory workers brought us into industrialization, not slavery."

Student B: I think it is possible to look at it objectively and you have to take into account like you said, his virtues, his morals, how he was brought up. We've seen the error of their ways now but we can't put ourselves in that time and if we did who knows what our thoughts and morals would be."

Student C: For someone who is brought up in the system [of slavery] and tell them that what they have seen their entire life is wrong. He's making a moral judgment to defend his way of life; that's the way I see it that he's on the defensive."

The shift in tone and insight at this point in the lecture demonstrated two specific potential practices for discussing historical empathy with students that this TA stumbled upon: first, students should be allowed to express outrage towards the sources that defend slavery (Fitzhugh, a defense of Southern slaveowners as more compassionate than Northern factory owners) to get their visceral, presentist feelings heard before launching into the analytical process. (The TA said towards the end of the discussion, "We all agree he's a jerk. But then what do we do and how do we treat people like him as historians?"); second, focus exclusively on the analytical process of the documents first, date, author, argument, audience, and perspective in order to neutralize the subjective tendencies when reading pro-slavery arguments and to emphasize the duties or crucial actions of the historian. The practices revealed here only helped to understand further how participants within this large course could apply these concepts in discussions in order to further the careers of these crucial concepts.

In TA4's interview, we discussed this moment because he talked about historical empathy as a concept he struggled with in his own research. He thought the section I observed did not apply historical empathy to the sources as well as his other sections. He described this section as one where he was constantly "pulling teeth." In regards to the students, he explained, "I don't really like telling them what the answers are so one of the things I try to do in section [is to] make them arrive at these points themselves. Maybe I just have 18 empiricists running around, but you are not going to convince them that they are going to write neutral histories." In his discussion, he was not going to convince them as a teacher yet the strategies employed to analyze the sources convinced students of the difficulty of reading these incendiary sources. But when talking about his own research, racial formation in eugenicists, TA4 admitted that it was difficult to exercise empathy for these "pretty bad dudes" but he saw it as his "job" or professional responsibilities as an historian to create an accurate representation of these historical actors. To use threshold concept terminology, this concept proved troublesome for the TA on two levels: applying it to his own research and in understanding how to use this concept in his discussions.

TA Stage 4: Framing of Historical Empathy. Where TA5 displayed an outright struggle with this concept and TA4 showed a similar struggle that led to a productive end, TA1 latched on to the concept of historical empathy in order to frame her discussion from the start. TA1 noted in her post-quarter interview that the historical empathy lecture affected her thinking and how she shaped her discussion section following the lecture. She stated, "I just remember that one standing out. Being like you can't ... it really changed their perception of how to judge historical actors. Like you can't impose your morals on the past, so I think that was good." When asked if this lecture changed how she approached her discussion section,

she replied, “I think I chose to focus more on how we are going to categorize these people [all historical actors]. Or how should we be ok [with] categorizing these people or why can't we impose our standards on them? As opposed to being, what did he think? Who disagreed with him? More like the ... it added a different element to section that week.” The historical empathy concept prompted her to modify the questions she asked about the readings for the week to “put yourself in the shoes” of the historical actors in the primary sources.

To illustrate how she added a new element to her discussion for that week, an excerpt from the start of her discussion section demonstrates how she chose to frame the discussion on slavery. She asked students to think about what future historians might say about current social problems and what their responses would be to those future historians about why they could not solve these problems immediately. The excerpt below shows the steps she took students through to consider change within an institutional system:

I want to talk about the importance of context when looking back at things. So I have a TA that has TA'd 17B before. Apparently he got a thesis statement from a really good student on the first paper that said, “slaveowners were assholes.” There are many problems with this.

Let's say it is 2313 and we're looking back at the year 2013. What sorts of things will people 300 years in the future critique us about? Like what are we doing that is obviously terrible or they will be able to easily say this is obviously a bad thing why don't we fix it?

Students listed issues such as overreliance on technology, global warming, wars, and abuse of natural resources. Then she added social issues to the list such as racism and LGBTQ issues. TA1 asked students, “So why aren't we doing things to fix these problems, we've acknowledged that these are big issues, but how come we can't change them right now?” Students responded with reasons such as lack of support to enact change or that people did not want to change. One student stated, “you can't change every issue all at the same time

overnight it takes time to change them”; another commented, “negative consequences aren’t big enough right to actually want to change. We know ... it hasn’t hurt us enough yet.” The TA drew upon her own background in economics to substantiate this last student comment. She asked if they had heard of the term “time discounting” where “things are not as expensive in present and it is hard to change things that will be expensive in the future.” At this point, she has asked students to list current issues at the time and reasons for why change is slow for these issues.

Then she moved to the issue of slavery. She asked students how do “we” describe slavery now? Students listed “morally evil” and “inhumane.” She then asked, “We also describe it as an institution. What does it mean to be an institution?” Students responded with answers such as it meant being part of a society “a necessary part of society” or government or economy. She then summarized where she was going in the discussion:

... economically, socially integrated. So if we think about all those problems we just talked about as institutional problems ... lots of factors. They affect the economy, they affect social issues, they affect how we think about our values in other systems. So there's not one way to go about fixing it there is all these things that need to happen. Slavery was an institutional issue, which made it so difficult to deal with.

In order to frame their discussion on slavery, TA1 walked students through specific steps to think about the profound challenge of rethinking their current definitions of slavery in relation to how historical actors defined slavery in the past. TA1 asked students to list current societal issues they encounter presently. Then she asked the students to imagine how historians in the future would analyze these current issues. Her goal in this exercise was for students to think about how difficult it is to change these issues in a short period of time. This connection between thinking about what students would want future historians to say about 2013 to their own thinking on conditions in the South in 1830s, 40s, and 50s provided an

entry point to approaching the primary sources – through the lens of historical empathy. Her approach to the discussion also involved three phases, just like TA4, except she devoted the first 5 minutes to this brief, effective exercise. Then she explained the agenda to them: they would analyze the documents together and then they would engage in a debate between Northern abolitionists and Southern pro-slavery people. She encouraged them to pay attention to the arguments in each source in order to substantiate their statements in the debate.

Not only did the opening reflection exercise orient students to thinking about how to approach the documents, she chose to start the discussion using another source besides the polemic Fitzhugh document (which proved a difficult source to approach in the other two sections). When she got to the Fitzhugh piece, she prefaced it by saying it was “a little weird” in an apparent attempt to disarm them from applying presentist views and focus on his argument and perspective. After some discussion around the confusing terminology of the document and its main points, she asked the class, “So who is he appealing to and how is he doing this? Are you convinced by his argument? Is he appealing to twenty-first century college students [laughing]?” Not only did she disarm the piece by calling it “weird” (this TA often used such language to appeal to college students), she centered their discussion on the fact that this author was appealing to a certain audience and he constructed his argument in a particular way. Just as TA4 used the primary source analysis actions to address primary sources, TA1 relied on her primary source analysis framework to do the same. This TA showed another possible method for framing a concept thus demonstrating its movement from Majewski to the discussion section.

Students and Historical Empathy. Six students wrote about how this concept affected their thinking in the final survey. One comment, from a student who was not in any section I observed, wrote a lengthy and insightful definition for historical empathy:

Historical Empathy. Looking at history in the context of the time period and socialization made me re-evaluate a lot of past events such as slavery and segregation. Although both events are inexcusable, I can see how it got carried out in the first place. The evolution process takes place in all things, including how the country becomes structured. To argue a point, I really have to use facts of that specific time period, instead of comparing and contrasting similarities from past and current events.

As seen in this response, the student claimed that the concept caused him or her to “re-evaluate” how s/he viewed slavery but the student connected it to the segregation era as well. This student also noted that this was the lecture s/he would apply in future courses.

Three students from TA1’s section provided comments and reflections that demonstrated the career of the concept surfacing in their thinking. One student, participating in the final survey, wrote, “I think the historical empathy lecture really helped. It helped me to not be so biased when analyzing certain texts. This let me think of more approaches to a prompt.” The “prompt” in this case meant the essay prompts assigned at the same time as the historical empathy lecture. The two students who agreed to be interviewed from TA1’s section described the impact of the historical empathy lecture in more detail. These two students selected historical empathy as one lecture important to them (in the final survey) but for two separate reasons.

The first student, Student D, the history major, remembered Majewski’s lecture but did not remember TA1’s discussion around historical empathy. Here is an example of the career of the concept extending to the student, but without the mediation of the TA. He defined the concept in his own terms during the interview:

That was the one [where] you take the document but then you don't put your bias into it, like you don't take a modern day view. So, for example, if I looked at Hitler, like a document from Hitler, like, 'ooh that's bad', but then I feel like, 'look, oh okay, it's bad in general' but then if I look back into the era ... the state of the world, Germany was in shambles I could see why he would be writing about that. [You can't just say] 'no it's just bad. Let's just ignore it.' It's more like I understand the era and then what he's trying to come up with.

It was unclear if this student's understanding of the concept was mediated by another course in his curriculum or if his understanding came directly from Majewski's lecture. Regardless, as a history major, he understood the concept well enough to apply it to another example demonstrating the direct route the concept took from professor to student, absent of the effective mediation of TA1.

The other student, Student C (English/Sociology major), remembered Majewski's lecture, particularly the slave narrative read in class, and he remembered TA1's discussion.

He stated:

Yes, that was eye-opening because ... I think someone brought up gay marriage [as a contemporary issue] and that how maybe 200 or 300 years from now, [looking] back on it, like the same way we look back on slavery, [a future historian might characterize our time period for being] dehumanizing and really not fair for human rights and stuff. So yeah that stood out to me. That one was interesting, I thought.

Student C was able to take TA1's framing of the discussion as a strategy for looking at historical events through the lens of the time period. The combination of the professor's lecture and the TA's framing of the discussion demonstrated the career of the concept in how this student approached slavery.

Another question in the final survey asked students to write which of the historical thinking lectures they would apply in other courses, either history or non-history courses. This point in the interview with Student C gave a fuller picture as to how the career of the concept crept beyond History 17B to other classes. Student C, wrote on the final survey that

he would apply the following skills to other courses, “how to approach analyzing important historical documents, finding background info, and figuring out their argument is critical to understanding the document.” When I asked him during the interview to elaborate on how he was applying these skills in his current (Spring 2013) courses, he said, “Do you want me to go off on using skills I learned in this class and [how I am] applying to different classes? Did I mention I’m reading [*Narrative of the Life of*] Frederick Douglass again?” At this point in our interview, Student C told me he was reading at that time the *Narrative of the Life of Frederick Douglass* for another course (English 103A) on the story of slavery and slave narratives. I asked him to describe what it was like to read it a second time:

So we read the *Narrative of the Life of Frederick Douglass* and then I just read *Benito Cereno* by Melville. So it's just interesting to see like ... how the narrative ... [how] point of view from somebody who experienced it first hand. So it's just taking skills that I learned from this class as far as understanding what was going on like the expansion of slavery that led to the [Civil] war and understanding that that was happening and then in *Benito Cereno*, he is foreshadowing the explosion might happen in US because of slavery ... understanding the background [of what] is happening and understanding Douglass’ point of view based on that is just really interesting to apply that and write on it.

In this excerpt, not only did Student C, comment on the context of the literature, he demonstrated his understanding of the time period through discussing these works. It seemed fortuitous for him to be able to continue his analysis of *Frederick Douglass* in relation to contemporary fiction of the time in order to identify the “foreshadowing” of war in both primary sources and literature. This proved to be a powerful example of the reach of the career of this concept to have an impact on student thinking beyond the confines of the course.

Winter 2013: Concept Four --Historical Thinking Lecture: Constructing Thesis Statements

Professor's Historical Thinking Lecture. In the opening lecture on meaningful and competing narratives, Majewski devoted part of the lecture to writing historical narratives. At that time he explained that one of the goals of the course was to teach professional historians' standards of writing. He discussed claims, supporting evidence for those claims, logic and persuasion. He connected this to the job of the historian: to think about contested narratives and write in a way to persuade others of alternative arguments. In the first lecture, writing was portrayed as more history-focused. However in this lecture, this previous language was not present in framing the discussion of writing thesis statements. While this lecture on creating thesis statements appeared more generic in nature, he presented this lecture as a historical thinking lecture on the syllabus (See Appendix E). Majewski may not have framed his lecture within the language he had previously used, but TA2 situated this concept within a more historiographical framework.

Majewski started the class by saying that the paper topics required much thought and reflection about the course at this point. He then explained the idea of writing as a form of thinking:

It's commonly said in academia, if you haven't written on it or lectured on it, you really don't know it. So you may have these great thoughts in your mind and you put them on paper and then you figure out that those great thoughts have big problems ... the linkages are not as clear as you anticipated. Or that you discovered a big contradiction in one of the primary documents and one of the things you had in mind.

In the excerpt above, Majewski drew an implicit connection between historical thinking (finding a contradiction in a primary document indicated the process of analysis must have occurred) and writing. Before launching into a series of iclicker questions related to evaluating thesis statements, Professor Majewski advised students to take their time in

thinking and writing the paper; writing a first draft to show portions to TAs; and to not wait until the night before to write it.

He used to iclicker questions for this lecture in order to gauge students' beliefs about thesis statements. He began his series of iclicker questions with the following slide:

A good thesis statement has the following attribute(s):

- A. It should restate the question
- B. Should be one sentence summary of the paper's argument
- C. You should always write the thesis first to organize your thoughts
- D. All of the above
- E. None of the above

Of the 356 students present that day (according to the final amount of iclicker entries), roughly half of those students thought A, B, and C went into writing good thesis statements. Seventeen percent of the students (~62) chose "none of the above" which the professor stated was correct. He launched into an explanation of why the other answers do not apply to good thesis statements while prescribing what he was looking for in their papers (although he did not directly grade any).

He stated thesis statements should do more than restate the question; they should be longer than one sentence; and students should expect the thesis statement to change as they write their paper. He urged students to think of the thesis as a "work in progress" and a process where there is a lot of "back-and-forth" and revision. He compared this to the process that all professional academics undergo, "I think this is true of all academics, we go back and forth and we have an initial hypothesis and we work on it and then we go back and revise and then that leads us to revise more of the paper and then it is a back and forth." Again, this statement was not history-focused yet it alluded to the idea of what expert historians do while writing, encouraging students to engage in the same process.

He then said, “your thesis will help structure your paper, but writing your paper will help revise your thesis. The thesis is kind of the anchor, it really summarizes your argument but keep in mind when you write your paper that you will have to rewrite your thesis.” In order to go through this process, Majewski urged students to take time to have the space for this type of back-and-forth process.

To further illustrate his points, the professor showed a series of thesis statements in order to show examples on a continuum of poor to excellent. His first thesis statement, “*Domestic ideology was indeed revolutionary because it changed the way Americans thought about gender.*” The issue with this thesis statement, explained the professor, was “the problem is the organizing principle, as the anchor of the paper, it is too vague. And doesn’t really tell me or any reader why it was revolutionary. That’s kind of a key point about a thesis. If your thesis doesn’t answer a “why” question on some level, it probably needs more thought.” So first heuristic of writing a thesis statement in this course was to answer a “why” question with the thesis and it must contain an organizing principle for the paper.

The next example he showed, “*Domestic Ideology was revolutionary because it allowed women authority over the private sphere, which in turn led women into reform movements.*” Majewski pointed out that the “why” element previously discussed is answered with the phrase “allowed women authority.” The inclusion of the reform movement indicated the writer found evidence that domestic ideology was revolutionary due to women’s participation in reform movements at that time. In the end, the professor deemed this a “good thesis” because it showed evidence to support whether or not domestic ideology was revolutionary.

The third example shown contained more specifics, in addition it was “more developed, longer, and showed lots of thought.”

"Domestic Ideology was revolutionary because it allowed white middle-class women (aside: notice it is much more specific, it's not talking about women in general which we know is not true but only a subset of women) authority over the private sphere, which made it important for these women to become educated. The combination of education and moral authority in turn allowed women to participate in reform movements and even influence politics."

The specific elements that made this statement “excellent” were the definition of the group of women discussed, evidence of their education and moral authority, and how that shaped their participation in political reform movements. This longer statement contained what Professor Majewski called “linkages” where the reasoning is linked to specific evidence, “they're specific and really, clearly show us where you’re going in the paper and that you've thought through the links in a very specific way. And it is easy to think of the evidence that is going to come in to support thesis three.” Furthermore this thesis indicated a possible conclusion to the paper, thus proving the role of the thesis statement as an “organizing principle.”

Winter 2013: Concept Four: Historical Thinking Lecture on Thesis Statements in TA Discussions

<i>Table 12. Concept Four and the Stages of Uptake Among TAs</i>				
Concept #4:	TA Stage 1: None	TA Stage 2: Minimal	TA Stage 3: Translation	TA Stage 4: Frame
Historical Thinking:				TA2
Constructing Thesis Statements		TA4		
		TA5		
<i>Note: I was not able to observe TA1's discussion section this week.</i>				

In extending the career of the concept of historical thesis statements in discussion sections, TA4 and TA5 displayed minimal references or supporting statements of how to do this. They extended the concept merely in talking about the generic thesis statement guidelines provided by Majewski. They spent less time overall in talking about thesis statements while TA2 framed his entire discussion around the concept in addition to situating the concept within the historical discipline.

TA Stage 2: Minimal connection to thesis statement lecture. TA4 and TA5 made minimal connections to this lecture in the quantity of time devoted to discussing the impending paper assignment. They both reserved the last five minutes of their sections to discuss thesis statements in relation to the upcoming paper assignment. In the discussion time he had left, TA4 started the thesis statement discussion by asking this question, “All this stuff we talk about, the meaning of history, how are you guys going to use that in your paper? If you were to make an argument based on our talk today, what would it look like?” Silence from the students ensued. Then he asked a more specific prompt about how they would develop an argument showing how pro-slavery or anti-slavery writers used the Constitution in their arguments. One student responded literally describing the organization of his paper in terms of quantity of paragraphs to write about the North and the South and their social, political and economic arguments. Another student (Student S) added that he would do the “same stuff” but he would talk about how the interpretation of the Constitution was a “constant struggle continuing today.” In the last thirty seconds, TA4 encouraged students to do what Student S suggested when reading the documents. “Think about the use and abuse of history and what it means and what these histories we tell ourselves about our nation and how they [these histories] interact with the present.” The general guidance provided here

spoke more to the ideas of contested narratives and history's relationship with the present, both concepts addressed by Majewski in the first concept lecture. But it did not provide guidance in terms of how to write a thesis statement.

TA5 spent the final five minutes of his discussion around the question of whether the Civil War was about slavery or not. He wrote the question on the board and drew two columns: "not about slavery" and "slavery." He asked students to tell him arguments for both columns. After students added four items to each column, he explained his own approach to writing thesis statements that did not complement what Majewski said in class. "To start off, a thesis is an answer to a question and you are all going to get the questions. The golden question is, was the Civil War about slavery? If the argument you are making is not contestable then you don't have a good argument." While TA5 invoked the contested argument idea, he did not elaborate on this point. He simply said the argument must be contested. Since he did not speak to this first concept lecture earlier it is unclear if students knew what he meant. "The second part of a good thesis is how you go about structuring your argument. How are we going to formulate that [pointing to the anti-slavery argument list on the board] into a way to make that a sentence?" Silence ensued while he wrote an argument on the board that encompassed what students listed. He pointed to it, stating, "in terms of what a good thesis consists of, this is an example right here." With that, class ended. These two examples of minimal references to Majewski's lecture showed the limited reach of the career of the thesis statement lecture to these discussion sections.

TA Stage 4: Framing of the thesis statement concept within historical methods.

TA4 and TA5 provided minimal connections to the concept of writing thesis statements, while TA2 coupled his analysis of the sources with the concept of writing theses, extending

both the career of these two concepts into the discussion forum. His particular discussion format revealed a practice for framing concepts for students while engaging them at the same time. He used this format more than once to frame the analysis of documents while addressing an important theme or concept for that particular week. For instance, in this discussion, TA2 used the sources from the third concept lecture (pro/anti slavery arguments). He had anticipated the essay topic questions release so he chose to focus on writing thesis statements using these documents. At another point in the quarter, he used this same format to analyze sources while addressing one central question about Abraham Lincoln's role in the emancipation of slaves. For this discussion, students analyzed each of the required readings that week. TA2 then asked them to put the author's argument into their own words, thus crafting a thesis statement. He divided the class into groups; each group discussed a reading with a particular task – to identify the argument and rephrase it as a historian would in the present. With each group's thesis statement, he analyzed the statement to show students where arguments could be clearer and stronger in terms of the use of historical evidence.

When assigning students into groups, he asked two groups to tackle the George Fitzhugh source because “it's tough.” This was the reading that proved to be the most challenging for students to address in TA1's, TA4's, and TA5's discussion sections within the historical empathy week due to the author's pro-slavery argument. TA2 recognized the difficulty of the source and warned them about the nature of the argument. His instructions to the class for the task at hand were,

Since the essay topics are coming up on Wednesday, I want you to discuss these and I want you to make a thesis statement about this argument and I want you to make an argument about what this document is saying and as a group we'll refine these theses statements. We'll talk about how we can write ... good arguments.

As students worked in groups, he approached each group to provide suggestions or support in reading the documents. Not only had he framed the discussion to focus on finding arguments in the sources, his prompts to groups often invoked them to think like historians, “First of all is this a moral argument? Is it an economic argument? What is his case? Then you're final task is as an historian, what would you say is the main thesis statement here?” In speaking with another group, he emphasized that historians make claims based on the evidence seen in the document. While students worked in groups, he framed his suggestions to them within the notion that they were historians enacting the primary source strategies he discussed with them in the first week.

Following the small group discussion time, each group produced a thesis statement that he wrote on the board. As a group, they critiqued the statements with the goal of making each thesis statement more specific (“*what is not clear here?*”) through evidence from the source. Once he started asking questions about the first group’s thesis statement, then students started asking questions among each other about the theses providing a model for clear writing and making it a “stronger historical kind of an argument” (TA2’s words). For example, when tackling the first thesis statement, students provided the following after reading one source written by Amos Kendal.

Their original statement:	Currently censorship is highly regarded as unconstitutional censorship and abolitionism is equally unjust.
Their Final statement:	Abolitionists use the constitution as the basis of much of their argument. However, Amos Kendal argued that abolitionism itself is unconstitutional because it incites violence.

Between the original statement uttered by the group and what they came up with in the final statement, the TA addressed writing mechanics (use of adverbs and passive voice), issues of clarity, audience, and finding evidence to support the idea they had in mind. Here the careers of two important concepts intersected within this discussion: crafting a thesis statement necessitated a closer analysis of the primary source (the “back-and-forth” suggested by Majewski but never made explicit or modeled). The following example was an exchange with the students in this group to clarify the subject of their argument:

TA2: What's the problem with that first sentence? Do we know who regards censorship as unconstitutional?

Student: No.

TA2: We don't know so that's something that we want to do. Who regards censorship as unconstitutional?

Student: People.

TA2: Many Americans?

Student: The American people.

TA2: The American public?

Student: What about the Constitution itself? Like the second amendment or whatever?

TA2: And so there's two ways of doing it ... the first is 'the American public' [so it would read] 'currently the American people regard censorship as unconstitutional.'

The other way that Student T. pointed out is 'the American constitution defines ...or ... there are provisions in the Constitution to prohibit censorship.'

Do you see how those are both active? They're both very different in talking about different subjects, but they're both pointing out that there is something that is active. So we'll do that.

So censorship and abolitionism is equally unjust.
What's the problem here?

It's equally unjust so I guess the argument is censorship and abolitionism is unconstitutional? Is that what it is saying? Why? That's the question here. We want to fix this up so that it is clearer. What do we know about this so we can clarify this?

In the excerpt above, the TA outlined what he wanted students to pay attention to in writing: using an active voice, identifying a subject, offering alternative versions of the subject, and necessitating clarity. In addition, he highlighted issues with the statement as saying, “what’s the problem here,” prompting students to rethink their original wording. Not only did students consider word choices, they considered prior knowledge regarding a previous discussion about abolitionists:

Student: Don’t the abolitionists use the Constitution as the main source of their argument?

TA2: Ok! That's a great argument. Given what Student E. just said, we don’t need ‘unconstitutional’ on the board, right? We actually don’t need it. What you want to say is ‘the Constitution forms the basis for much of the abolitionists’ arguments.’

In this excerpt, the student connected the abolitionists’ use of the Constitution in their argument (it was from a previous week’s reading) and juxtaposed it with the author in question using the Constitution to justify censorship. This final student question led the TA and students to finalize the wording of their thesis statement. He went through the same process with four more statements from four separate groups, ending with this advice:

So the point is [writing] a thesis statement is hard. You have the argument, the argument is easy. You guys are good historians ... we have been doing this for 3-4 weeks now. It is more an issue of writing. So really think about things like active voice and clarity. Those are the two things you want to do. Make it sound active and strong. Be strong in your voice and make it clear what you mean. Ok? We're good.

In this discussion, TA2 provided an actual model for students to question their initial formulation of a thesis statement. Through dedicating the whole class time to the endeavor,

he supplemented Majewski's lecture beyond mere mention of the concept and fully incorporating it into the discussion and making it historical in nature. This type of modeling of what it means to write and revise a thesis statement showed students how to apply this concept to their own work. TA2 discussed in his interview how he never intentionally referenced Majewski's lecture to frame this discussion.

Students and Thesis Statements. To see where the career of the concept surfaced in student thinking, five students wrote about how this concept affected their thinking on the final survey. Four of the five statements related to the realization that the thesis statement could contain multiple sentences. The fifth student wrote the following, "The discussion about multiple sentence theses helped my historical writing capabilities. It keeps you from limiting your thoughts to a single phrase, and helps you think in a broader manner." The student recognized the lecture as applying to the discipline of history even though Majewski presented basic guidelines for writing thesis statements. The notion of the thesis statement going beyond one sentence indicated the career of this writing concept even though this is not a history-focused idea.

One of these five students from the final survey, Student K from TA2's section, consented to an interview. She stated, "Well, when he [Majewski] talked about papers and stuff like that he [TA2] kind of referred to it, because he said or he mentioned certain tips on how to write your papers so I just thought, 'ok, I just put them together.'" There was no deliberate attempt on TA2's part to align his discussion with Majewski's (TA2 Interview, 2013) yet the student perspective acknowledged the connection in a positive way stating how this concept was most helpful for her:

The thesis statement was most helpful to me because I am not a writing expert ... and history papers are really different from regular English papers. So when he

[Majewski] went into detail about what kind of thesis statement you need for a history paper, he showed those examples, ‘and this would be good but this would be better, the more specific you are’ and that helped me guide myself and then I went to TA2 and he was even more helpful.”

The two references by Majewski and TA2 to writing thesis statements reinforced this concept for her. While Majewski focused his lecture on expanding the statement beyond one sentence, TA2 led an active workshop to apply this idea. This excerpt demonstrated one example of when the concept traveled successfully from professor to student. This was despite the TA not doing this on purpose. TA2 managed to unwittingly complement Majewski’s lecture and, according to the student, amplified it in a more history-specific way.

Winter 2013: Careers of Concepts Conclusion

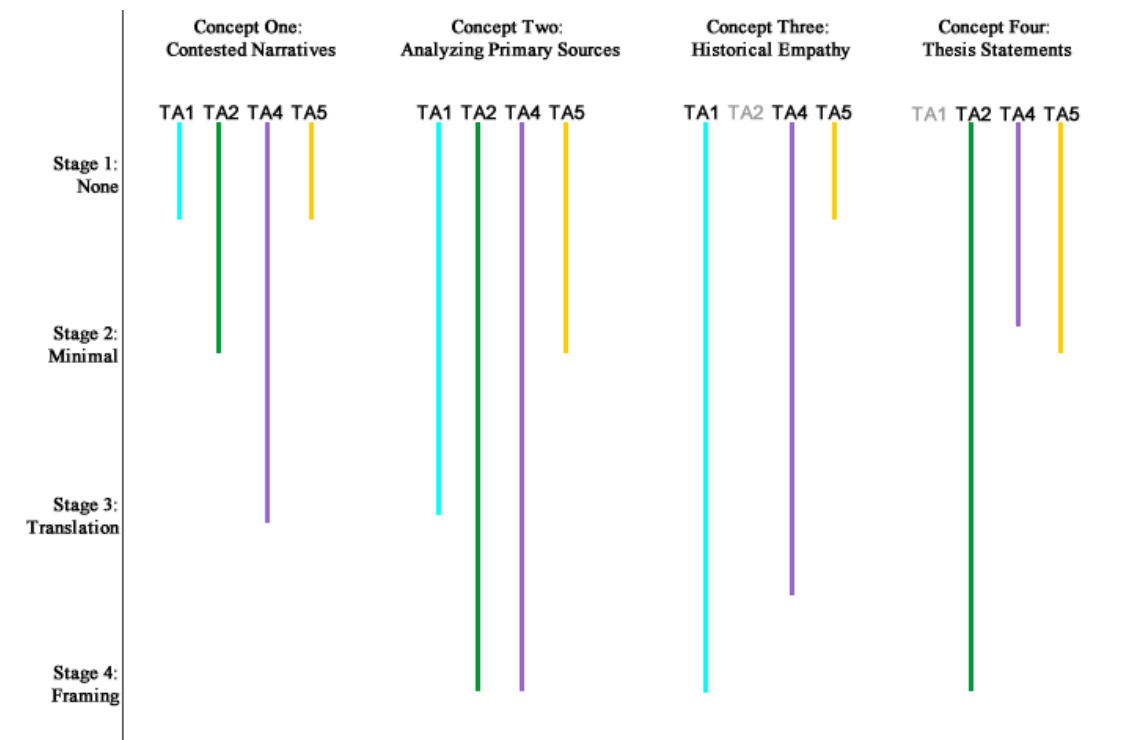


Figure 1. Summary of careers of concepts in Winter 2013

Careers of concepts were furthered when certain Stage 4 practices were in place to perpetuate their existence. When TAs framed the concepts in order to advance their

movement within the discussion sections, the following teaching conditions were present: tailoring questions to prompt students to make their own connections (TA4: “What will we read this quarter that are considered ‘contested narratives?’); modeling and coaching of what historians do (TA2 and TA4 demonstrated the centrality of analyzing primary sources); and establishing a tone for discussions (TA1 framing exercise). The TAs who demonstrated Stage Three and Stage Four capabilities of translation and framing chose these particular strategies based on their own experiences, their perspective on the discipline, and their alignment with their identities as historians and teachers.

By starting a discussion about what meaningful and contested narratives meant, TA4’s attempt to translate the concept prompted students to consider the contested narratives they would read in the course. Through the discussion of what contested narratives were, students listed important factors to consider when analyzing these narratives: responsibilities of a historian: evaluating evidence, understanding an author’s perspective or motivation, establishing validity, and understanding the context of a source. These factors outlined some of the main responsibilities of an historian. Generated from students, TA4 established an initial framework for getting students to think like historians. Evidence of elements of this framework surfaced in each discussion as TA4 maintained a focus on what historians do and how students were doing similar work.

For the analyzing sources concept and the thesis statement concept, TA2 modeled the act of analyzing primary sources. In framing both concepts for students, TA2 established a “back-and-forth” rhythm for looking at context, analyzing sources, and returning to larger context in order to analyze sources closely again. He modeled the back-and-forth actions of

a historian in how they make claims about a text while understanding the specific points in that text to support that claim.

When discussing thesis statements, TA2 steered the discussion in a way that held dual purposes that reflected aspects of Majewski's thesis lecture: students needed to re-analyze the document in order to restate succinctly the author's argument. The TA analyzed the argument in terms of making the statement clearer both grammatically and in using proper evidence. The action of analyzing sources held a purpose beyond just reading the source but reading in order to write better. He actively coached student groups while they discussed documents using prompts that consistently referred to them as historians.

TA1 decided to open her discussion with an exercise to get students to consider present societal concerns and how they would be viewed in the future. The entire exercise lasted five minutes, yet it established the tone and goal of the discussion to view the documents as representing perspectives within a particular context and time period. TA4, in a similar attempt to discuss the role of presentism in history, faltered at the onset of his discussion. Returning to the text and focusing on the analytical process (specifically the argument of each document, its intended audience, and the degree of persuasion) anchored the discussion to the historian's task. Based on this discussion, TA4 recalibrated his earlier question prompting students, based on three comments, to separate their personal perspective from the author's perspective at that moment in time.

At times, TA discussions aligned with Professor Majewski's lectures; at other times, they did not and in one example, the TA's framing capability expanded what the professor had done in lecture. In order to understand the motivations and experiences of the TAs and how those potentially contributed to framing that advanced the careers of these threshold

concepts. Next, I will briefly examine the TA interviews conducted following the quarter to gather their reflections and perceptions on Majewski's threshold concept lecture interventions.

Winter 2013 Interviews

TAs

Following the quarter, I interviewed four TAs, four students (two from TA1's section, one from TA2 and one from TA4), and Professor Majewski. Following the careers of the concepts and seeing the extent to which they traveled from professor to TA to student in the course, it became evident that the role of the TA in this large system was crucial in carrying out Majewski's intentions to support students' development of historical thinking skills. Previous attempts to incorporate historical thinking in courses occurred within upper-level seminars where the professor was in direct contact with students (Calder, 2006 & 2013; Coventry, et.al. 2006). But in this course system, the TA role had the most direct contact with students. Helping students cross thresholds into the discipline could be accomplished if TAs were weaving the concepts within their own discussion sections through the translation or framing of the concepts. It is important to keep in mind that Majewski (apart from the initial meeting) did not describe or explain what his historical thinking lectures were about or when they would occur during the TA meetings.

Because these historical thinking lectures and their connection to content lectures were not explained to the TAs, my questions to them centered on their teaching experience and their views on what happened in the course: if and how the historical thinking lectures had an impact on their own practice as instructors; their own thinking about their discipline; and the practices shared with each other in the TA weekly meeting. The salient points of

their interviews will be discussed in three parts: TAs' thoughts on the historical thinking lectures, the threshold concept framework, and the weekly TA meetings. Taken together, the ability of the TA to extend the careers of the concepts into their discussion sections could have depended on some of these variables.

TA Perceptions of Majewski's Historical Thinking Lectures. The first two historical thinking lectures, 1) meaningful and contested narratives and 2) analyzing primary sources received the most attention in the TA interviews. TAs identified with the first lecture through its reification of their understanding of what the discipline of history was about. The analyzing sources lecture was discussed in relation to practices I observed within their sections. Therefore more time was devoted to these lectures in the interview. To briefly summarize the comments of the other two lectures, TA2, TA4, and TA5 did not mention historical empathy during their interviews. TA1, as seen in the Historical Empathy section (p. 60), framed her discussion section after hearing Majewski deliver the historical empathy lecture. TA2 and TA5 mentioned briefly how the thesis statement lecture was helpful to students.

Below, I will focus on the TA statements regarding more extended discussions around the first two concept lectures, meaningful and contested narratives and analyzing primary sources. These extended discussions revealed TA attitudes regarding what they valued in their discipline. Furthermore, these moments in the interview revealed their reflections on bridging disciplinary concepts to their own teaching.

Historical Thinking Lecture: Meaningful & Contested Narratives. During the interviews, I asked each TA the following question, "Based on the concepts Professor Majewski focused on this quarter, which ones resonated most with you?" The first lecture on

meaningful and contested narratives resonated with all four TAs. Even though they did not fully frame their own discussion sections around this concept, it clearly reified their understanding of the purpose of their discipline. TA4, who did translate this concept for students in his first discussion meeting, defined the lecture as a crucial concept to the discipline:

I think once you understand ... once a student understands the history. It happened but it didn't really happen the way, it is a written document that people are making choices about it. Once students understand that it opens a door into these other things like contingency, causality, continuity, change over time and stuff like that.

In the excerpt above, TA4 explained that he did try to emphasize historical thinking more in his sections than in the previous time he had TA'ed the course (under a lecturer in Winter 2012). In his statement, he provided an unsolicited definition of a threshold concept in that if a student understood the idea that all narratives were contested then understanding other concepts in the discipline would make sense.

These other “concepts” TA4 mentioned here extended from an article given to him the previous fall quarter of 2012 by Dr. Patricia Cohen, the professor of History 17A. (TA1 and TA2 also taught as assistants in Dr. Cohen’s course.) At the beginning of the 2012 quarter, Linda Adler-Kassner interviewed Dr. Cohen about what she considered threshold concepts in history. It appeared Dr. Cohen became intrigued with the idea enough to give her TAs in History 17A an article by Thomas Andrews and Flannery Burke (2007), two historians writing in the online magazine of the American Historical Association, entitled, “What does it mean to think historically?” The article, influenced heavily by Sam Wineburg’s book *Historical Thinking and Other Unnatural Acts* (2001) introduced five concepts (change over time, context, causality, contingency, and complexity) that they

viewed as central to the discipline and identified them as concepts that should be taught to students. For each concept, the authors provided an example of an exercise developed with the concept in mind. TA2, in his interview, remembered this article yet he thought it was the threshold concept article (Meyer and Land, 2005) that Majewski promised to hand out in their first TA meeting. TA1 recalled the document describing how Dr. Cohen applied the article to the essay assignments:

So we spent a lot of time in her class like ‘you need to learn how to think like historians’ and the papers, there weren't prompts, they [students] had to find their own prompts and like figure out questions from the primary sources which was really hard especially [since] it was the first quarter for a lot of freshmen too. But the ones that figured it out wrote excellent essays.

In this excerpt, TA1 described the assignment where students were asked to be historians, framing their own questions in order to find the appropriate evidence within the sources to answer the question. This type of exercise has been documented in upper-level seminar courses (Coventry, et.al., 2006) but not within a large lecture course with freshmen.

While the three TAs were able to make connections between Majewski’s and Cohen’s attempts to infuse the 17-series with threshold concepts, TA2 described the contested narratives lecture as one he hoped students would take away from the course:

So I hope that is something they take ... thinking in terms of narrative, thinking of contested narratives, thinking in terms of contested narratives and arguments and things like that, you can get through your reading faster. These are skills that help them on a very pragmatic level.

TA2’s and TA4’s reflections on this concept may have led each to an implicit connection between their previous experience with the concepts (possibly derived from their teaching for Dr. Patricia Cohen who also emphasized historical thinking) and how they approached the concept in their discussion sections. Their reflections revealed the resonance of the ideas and the importance, in their view, of this concept to the discipline and to how

they utilize these concepts in their own work. I asked the TAs if they viewed whether or not this concept surfaced in student work.

In discussing contested narratives, TA1 discussed student work that pertained to an essay prompt around the question of whether or not Lincoln should be viewed as the Emancipator of slaves:

We read all these different authors' perspectives on Lincoln, is he a good guy? Bad guy? What is he up to? So then from that the students are supposed to pull out these, often conflicting, arguments and form their own opinion based on what all these other people are saying.

... I think that fits well with how we deal with contested narratives and the fact that history is a contested narrative. It is not this thing that happened in the past and we recite these dates and it's over.

In the excerpt above, TA1 discussed retrospectively the idea of the second essay assignment related to the question of Lincoln. In her comment, she made a connection between the concept and how it surfaced in this writing assignment where students were asked to analyze contested narratives about Lincoln in order to create their own argument.

I asked TA4 the same question whether he saw evidence of students' understanding of contested narratives while grading student essays. In his response, he mentioned his students briefly saying the better students were able to apply it. But then he returned to what happened in Dr. Cohen's course and her essay assignments that had no prompts, except to "do what historians do."

The poorer students floundered and the better students got a lot out of it and the people who were committed to the idea of really getting into the coursework, I think they did really well. And I was surprised at how well they handpicked up the idea of competing narratives. But the people who are fulfilling the GE requirements or what ... for whatever reason they were there I think they were still maybe they just still clung to whatever preconceptions of history they had.

In the excerpt above, TA4 reiterated a common notion among the TAs interviewed that better students will grasp ideas quicker and apply them more than the slower students. Even though the question pertained to History 17B, he recognized the concept more in the student work from 17A.

Overall, the four TAs appeared to understand the importance of this concept to their discipline and to the idea of teaching students to understand this concept as well, even though TA4 was the only person who attempted to translate (Stage 3) the content of Majewski's lecture into the discussion.

Historical Thinking Lecture: Analyzing Primary Sources. During the TA interviews, there were very few remarks about this second historical thinking lecture, analyzing primary sources, specifically. Even though the analyzing primary sources lecture may not have provoked many reactions on its own, my question about the lecture was bundled within a series of questions related to understanding the varied approaches to analyzing primary sources displayed by the TAs as seen in Table 9 (*Comparison of primary source analysis strategies for professor and TAs*, p. 103). Taken together, the responses to these questions demonstrated certain disconnects between what the TAs did in section and what the professor focused on in his lecture. TA1 remembered that this lecture stood out to her, but she attributed that to the “novelty” of watching a video of someone analyzing a source. TA5 thought the lecture was not helpful, stating that he received reactions from his students that it was not effective, even implying the students thought the video and/or exercise was a “joke.” TA4 never mentioned the lecture or exercise in our interview. TA2 explained that what he did in the lecture conformed to what Majewski did.

The purpose for these questions concerned the timing of the lecture, discussions, and practices involved in the first two weeks of the quarter leading up to this second historical thinking lecture. I asked each TA the following questions related to the whole concept of analyzing primary sources:

- the origin of the discussion of the difference between primary/secondary sources
- the origin of the primary source reading guide itself and how they integrated it into discussions
- how it connected to Majewski's reading of primary sources.

These questions centered on the discussions and practices surrounding the threshold concept of analyzing primary sources.

At the first weekly TA Meeting of the quarter (unrecorded), Majewski asked TAs what they liked to do on the first day of section. TA2 stated that he liked to discuss the difference between primary and secondary sources. Majewski affirmed that would be helpful to do and each TA (that I observed) held this discussion in his or her sections. In addition, three TAs handed out a primary source reading guide to students. In the second week of the quarter, Majewski did not explain to the TAs what he planned to do for his second historical thinking lecture with the think-aloud video clips of analyzing primary sources and the accompanying iclicker questions. In fact he alluded to it as being a "vague" detour from the regular lecture plan for that day. This second historical thinking lecture, then, followed what the TAs did in their discussion sections in the first week: the discussion of primary and secondary sources and the handing out of the primary source analysis guide (Appendix F).

When I asked the question of where the practice of discussing the difference between primary and secondary sources came from, three of the four TAs said they had done it every quarter they taught at UCSB. TA5, the most experienced TA in terms of years, could not tell me the origin of this practice even though he deemed it important:

I think every quarter I've TA'd I've done that. So someone, I think someone suggested it when I was doing [History] 2C maybe, like my first quarter as a TA.

It's just an easy ... it's something that's important for them to know for the class, and it's too early to get into anything substantive, but that is, that is kind of the one thing that they ought to know, I think, about, about history and what we're going to be doing in the section. I don't know. I don't know what it came from. I think it's just one of those things that everyone does.

In the excerpt above, TA5 explained the importance of this discussion in relation to what students needed to know about history. He also alluded to the idea that this was a good discussion to have on the first day in order to hold off on doing anything “substantive,” meaning anything related to the course readings. TA5 did not hand out a primary source reading guide to students. In terms of whether the concepts surfaced in his discussion sections, TA5 was in Stage 1 for the meaningful and contested narratives lecture and Stage 2 for the analyzing primary sources lecture.

TA4 held a brief discussion on the difference between primary and secondary sources in his first meeting with students. In our interview, he did not speak to the origin of that practice. He did email students the primary source reading guide which he said he received from another TA in History 17B. He did not discuss how this reading guide differed from Majewski's strategies in the second historical thinking lecture. TA4 was in Stage 3, translation, for the first two concept lectures.

TA1 explained that it was not written anywhere [in departmental guidelines] that the discussion on the difference between primary and secondary sources should be done. “I think I've done it at the beginning of every section at that first meeting just because [there are] so many non-history majors and it is important to understand that distinction.” While TA1 saw the importance of this type of discussion, I asked her if she thought it was important for students to make that distinction as the course progressed. She wondered aloud if it was necessary given the emphasis on analyzing primary sources from the primary source reader (Majewski’s book) each week. “We are not throwing documents at them where they have to decide, ‘is this a primary or secondary source?’” In her case though, she held this discussion with students, then she passed out a primary source analysis guide in order to analyze the Andrew Jackson veto letter. She coupled the purpose for the primary/secondary source discussion with the analysis of a primary source. Again, the origin of the guide she chose was not known either, “I don't remember who I got it from ... we just have a couple of documents like that that circulate around the history department.” As mentioned previously in discussing how TA1 translated this concept for students, she was consistent in utilizing the resources she chose to use with students in her section even though it did not correlate with Majewski’s primary source reading strategies.

TA2 emailed a primary source reading guide to students in the first week only because a student asked him for one:

We did not address it in class and it was more of a bonus. I added it because one of the students had asked if I had such a thing so I sent it out to the whole group and said this is worth looking at. I didn't write it either ... I think it is the same one everyone else gave out.

TA2 referenced the primary source reading guide (Appendix F) used by TA4 that he received from a fellow TA in History 17B. I asked TA2 how this reading guide connected to what Majewski had done in class in his second historical thinking lecture:

I think it is pretty similar, the questions, I mean, it has, "who, what, when, where, why" and explain that stuff. What he did that was different and had, I think, everything to do with the example itself ... to show that he could kind of jump into it and guess certain things and demonstrate that. And I think that was probably more helpful.

In the excerpt above, TA2 outlined what Majewski did in terms of “jump[ing]” into it and “demonstrating” analyzing primary sources. TA2, when addressing his class after this second historical thinking lecture, asked students to “jump in” to their readings for that day. After this explanation, he stated if he were to do his own primary source guide, he might show an annotation of his analysis of a primary source.

When I asked TA2 about the discussion of the difference between primary and secondary sources, he could not recall the origin of the idea for this type of discussion and connected it to something he learned himself in high school. He then called the difference between primary and secondary sources “an unquestioned assumption of our discipline. We don't think about that much. That's ... as close to a hard rule as we've got is these distinctions between sources.” As TA1 discussed the importance of this distinction, TA2 elaborated on its importance in relation to the discipline. When I asked why this distinction is so important to point out to students he explained:

One reason it figures so prominently in the first couple of weeks is ... it helps distinguish between the material. Because when the students have this reading material, maybe in real life the difference between primary/secondary is a little more hazy, but in the course of or in the context of the course it is not.

They have a reader (Majewski's) and a textbook and [*Narrative of the Life of Frederick Douglass*]. So, I think it's important to us, we decide that it is important to

know that they are to be read differently. It is all about trying to introduce the idea that you read different things differently. I think that's ... just one of those things that's been around.

This was the most extended explanation for why those discussions took place. Within his explanation, TA2 connected the discussion to larger epistemological practices of historians (“important to us”) of reading materials differently. He ended this explanation by saying it was one of those practices that has circulated “around” the department therefore it ended up in his discussion as well.

My next question to him centered on the timing of the primary/secondary source discussion and Majewski’s historical thinking lecture; I asked him whether the discussion should come before or after the lecture. He attributed the lecture to something only Majewski would be able to do, “It would depend on whether [there is] a different professor who might not do that lecture? In which case I would still do it. But I think he did a better job than I did so maybe I would be try to be more creative. Now that you pointed it out, I have never thought about it. I'm questioning if it is even useful.” In this statement, TA2 questioned whether the discussion of the difference of primary and secondary sources was useful in light of the type of lecture that Majewski gave regarding primary sources. Furthermore, he reflected aloud on how he would incorporate this type of discussion (of the difference between primary and secondary sources) differently, describing his own approach as not being creative enough.

When I asked if the students maintained their ability to distinguish between these source material types as the course progressed, he connected this question to maintaining a focus on analyzing primary sources:

I think it gets completely lost to be honest. Because we start off with this and these are the questions you are going to ask -- who, what, when, where -- and you got them on record. By the end we're not doing that anymore, by the end we've got eight documents: we need to understand Reconstruction real fast and you start talking about the differences between them before you even get the timeline out and talk about who the people are.

So I tried as much as possible to keep 'the who wrote it' going but over time we lose things like the geography of the documents, the chronology of the documents, those things. So it does get lost and maybe that is something to think about.

In the excerpt above, TA2 conflated two issues (difference between primary and secondary and the primary source reading guide) in this one response. However, what he was saying got lost was the distinction between primary and secondary sources as the focus transitioned to primary sources exclusively in the course. Then he expressed frustration with the amount of reading per week where important analytical strategies disappeared in order to cover what students needed to know. He lamented the absence of establishing the "geography" and "chronology" of the documents that were crucial elements of contextualizing primary sources.

Overall, the TAs interviews revealed two major disconnects between the practices handed down through the department or other graduate students and the specific need of those practices within the context of History 17B and the historical thinking lectures provided by Majewski: discussion of primary/secondary sources and the use of primary source readings guides with unknown origins (and little evidence of application throughout course). Only TA1 and TA2, the least experienced teachers of the four, could justify the discussion of primary/secondary sources as important to understand in relation to the discipline even though the practicality of the discussion might not have been needed in relation to the course.

TA perceptions on threshold concepts. During each interview, I explained the basis for my research citing the threshold concept framework as the impetus for Professor Majewski's historical thinking lectures. This involved giving the TAs a definition of threshold concepts and why Majewski chose to integrate these concepts in the course. This had been the first mention of the term 'threshold concepts' discussed with the TAs since the opening TA meeting four months prior in December 2012.

Both TA2 and TA4 mentioned the meaningful and contested narratives lecture as a concept that, once understood by students, allowed them to do more within the discipline. TA2, when discussing what he hoped students took away from the course, referred to the concepts as tools for facilitating historical knowledge:

What I hope they [students] realize is that the threshold concepts, once you got them, it's about giving you tools to make your life easier in an undergraduate history class for the most part. For us, these things guide what we do in a big way. It should make their life easier to know these things because they can, it allow[s] them to wade through stuff faster

In the excerpt above, TA2 identified with the concepts in saying that they "guide what we do" as historians. He alluded to how understanding the underlying foundation for how historians do what they do contributed to the ease of figuring out any history course. TA4 referred to this concept as opening doors to other more complex concepts within the discipline. Both TAs, unwittingly, described this concept within the threshold concept terminology characteristics of being transformative and irreversible in the sense that the concept "opens doors" to other concepts and it reveals important actions to carry on to the next history course.

TA2, who framed his discussion around the thesis statements, also discussed the thesis statement lecture within the idea of core concepts of the discipline. TA2 stated, "The

thesis one was really good ... it's just that example of the three theses because that is a core kind of concept of what an argument actually is and what does it look like.” TA2, echoing what he had done in his discussion framework, connected the thesis statement lecture as crucial to the discipline and that the lecture was effective for students.

Within our discussion of threshold concepts, TA4 questioned the purpose of “pulling back the veil” for students in terms of revealing epistemological principles of the discipline within a general education course. I asked him if this is what he thought Professor Majewski was doing in the Winter 2013 course. He answered saying that he did think this was Majewski’s purpose but he went on to say:

I feel like on some level these surveys need to be content-driven because I really think on some level that there's a lot of remediation. That we're making an intervention into a shitty high school system where students are not coming out understanding the basic facts of history and to throw these big historical ideas [at them] ... then I don't know, should we just teach to the people who would be able to understand them? [It is a] juggling act and something that I am legitimately confused about and my role in this whole process.

This was actually one of many instances in the interview where TA4 revealed his reflections and thinking on the purpose of a general education history course. The first instance regarded his belief that students who are not history majors do not latch on to these larger disciplinary concepts. The second and third instances displayed his own thinking about balancing content versus teaching people to think as historians. This final instance revealed what the TA was trying to work out in his own mind after teaching 70+ students and the needs they might have faced in the section. He called the lectures “big historical ideas” and “abstract” even after I pointed out to him that he maintained a thread of focusing on the text and calling students historians throughout his sections. In my analysis, he exhibited practices that put these “big historical ideas” into action yet he was legitimately confounded as to his

capabilities for striking a balance between connecting historical methods and content in his sections. His comments are important to consider when looking at the issue of identity in TA development because he seemed caught between the roles of being a graduate student and being a teacher facilitating concepts (“big historical ideas”) he himself grappled with in his own work.

How did TAs see themselves as working to cross these historical thresholds? In the course of discussing threshold concepts, I asked the TAs if they saw themselves as working through some of these disciplinary thresholds in their own graduate studies. TA5 said he was working on all of them but he had not given them much thought, “I haven’t even really given much thought to this idea of threshold concepts. It’s nice to think about what [Majewski] perceived as the important set of skills that historians need to have. But I haven’t, uh, haven’t thought much about it.” TA1 also said she was working on all of them at the same time. In my explanation of threshold concepts for her, I mentioned the idea that crossing disciplinary thresholds consisted of a progression towards these concepts, she explained:

Last year I came here having one history class before I was in history graduate school and I was like I don't know what I'm doing and I don't know how to read this fast. Reading lots of books is one of the threshold concepts for me. I had such a hard time picking out an argument and creating my own argument. So he sort of gets at that with historians and how they argue, but I think finding and creating arguments generally ... which we sort of got at through all these lectures, I don't know how to distill that into its own little section, but that is what I remember struggling with.

In the excerpt above, TA1 took the idea of threshold concepts as I explained it and translated the task of finding arguments as a threshold concept she struggled with in her first year of graduate school. At one point, I described Wineburg’s findings about historians in terms of their tacit strategy of sourcing. TA1 exclaimed she did not learn to do that until her second

quarter in her first year. As a complete novice to the discipline, TA1 expressed her own frustration of what she was trying to learn and teach simultaneously.

TA2 did not express what he worked on most in his studies at the time through any one concept as outlined by Majewski. He did not understand the question at first, asking me if I meant, “like, if I’m in the process of figuring something out?” I responded affirmatively adding, “as you are turning into an historian, where do you see yourself within these thresholds?” He discussed his difficulty with condensing multiple ideas into one – either in his own writing or figuring out the main theme he wanted to convey in any given discussion section:

I'm in the process of learning to take things one idea at a time and recognize what is the important idea in this body of literature. When I'm trying to answer eight questions, what is the question I should be answering because all the other ones pull out of this. So that's the one I think most self-consciously engaged in trying to learn.

He had discussed this issue earlier in the interview in light of boiling down the main questions he wanted students to consider in a discussion section. Even though TA2 could not express his struggles within one of the concepts Majewski identified, it appeared to be related to the idea of building a cohesive argument. Through the TA responses, their reflections demonstrated awareness on their development in the discipline.

TA Weekly Meetings. In order to understand the purpose of the weekly meetings for TAs in History 17B, I asked questions about the practices involved in this meeting, primarily the responsibility for each TA to come up with a lesson plan related to the readings. TA1, the novice graduate student, found this practice to be very helpful:

I don't know if all of the 500 meetings in history department do this -- but I know at least for the whole time I've TAed for US History series (17C, 17A) and for 4C right now, it's always one person's responsibility to come up with a lesson plan and then the professor is like ‘hey you should probably touch on this and this and this’ and

then it's much easier than going into a meeting like 'there's all this material and I don't know what exactly the professor wants me to emphasize and I don't know what will be on the midterm, final, and papers' so it's good these are things to touch on.

TA1 looked to the weekly meetings to gain perspective on the professor's perspective and learn about the main points of the materials.

When it came to whether or not TAs used these lesson plans, TA5, the most experienced graduate student, stated he did not implement the lesson plans from other TAs, "I always do the same thing. I always read the stuff and think about the questions that I want to ask." However, when I asked him how UCSB supported graduate students in comparison to the school where he received his master's, he acknowledged that the weekly meetings and Majewski's observation of one discussion section in the quarter contributed to more of a support network around TA development than he experienced previously (which he described it as "being thrown to the wolves").

TA2 said he used the lesson plans pretty closely, although he recalled one week where he did not, "That week I did not. Because I think that was what *not* to do. It was that the lesson plan was this huge long thing with tons and tons of questions. And I thought, 'there was no way.'" In this comment, TA2 referenced a particular week where students read five documents, one of them being Abraham Lincoln's first inaugural address which he said was really long. So his comment stemmed from thinking about how to analyze the sources for that week and address the main questions related to those documents. Furthermore, he mentioned that he had discussed the deviation from the lesson plan with TA4.

TA4 also used the lesson plans in order to "get questions that I hadn't thought of..." In the sections I observed, this TA referred often to the lesson plans when leading discussions. If group work had been a part of any given lesson plan, he would not

incorporate it because he felt group work was too complicated. I asked this TA if Majewski referenced the historical thinking lectures in their weekly meetings, he replied, “ he never picked it up. And then unless you had really been looking at the syllabus each week to see the lecture title, they usually came as a surprise.”

Earlier in this chapter, I claimed the careers of concepts traveling through a large lecture system depended in large part on how these concepts were explained, interpreted, or disseminated to students. Additionally, TA attitudes or dispositions towards the discipline and teaching could also have factored into how the concepts were framed. For example, TA1, TA2, and TA4, due to their teaching experiences in History 17A, remembered how Dr. Cohen applied historical thinking in her course and made tacit connections from those ideas to what Majewski was trying to do. Thinking like an historian and trying to teach what that meant to them were forefront in their minds. These excerpts from the TA interviews outlined important considerations to take into account when thinking about how the careers of the concepts could have been carried through the course based on the teaching experience of the TAs, their capabilities for identifying with the concepts themselves, and their attitudes towards the discipline.

Professor Interview

After interviewing the TAs and the students, I met with Professor Majewski to review excerpts collected from the interviews and surveys surrounding the four concepts outlined within this chapter. I formatted the data in tables to show the context for each excerpt within each historical thinking lecture that surfaced most in the TA and student interviews. The linkages existed among the student comments, discussion section observations, and the TA

comments. After showing him these key moments, he discussed what he would change in the next version of the course.

Analyzing sources discussion. Given that I discussed the question of how TAs started their discussion sections in Winter 2013 with an emphasis on the difference between primary and secondary sources, I asked Majewski about the importance of this discussion for students from his perspective. He talked about this issue within the threshold concepts framework:

It is important because ... it's a classic threshold concept where... if you ask students to give a definition of a primary or secondary source they are good, but when you get to practical application they are not good at all.

From my standpoint, I think it is a good way of starting off the quarter to get students to think about that. I had a student in tears because she didn't use any primary sources in her paper because she didn't know what primary sources were. She thought the textbook was fine.

In the excerpt above, Majewski contributed his own thinking on the subject by describing its importance when it came to the essay assignments. Knowing the difference between sources was not as important when applying that knowledge within an assignment. This distinction, for Majewski, could be drawn from threshold concept literature in the idea that the concept could be seen as troublesome for students yet when it is understood, then student could apply it with ease. For the first essay assignment, only one of three question prompts encouraged students to reference a secondary source in addition to specific primary sources. While the idea that the difference of primary or secondary sources was important to discuss in light of student understanding, the evidence from the sections and interviews showed the discussion had little bearing on how the students discussed primary sources in sections. This will be

important to consider when looking at what the TAs did on the first day of section in Winter 2014.

Looking at TA perspectives. Majewski found TA4's comments most intriguing regarding the balance between teaching historical thinking and content within a general education course. In response to TA4's comment where he questioned if "we just teach to the people who would be able to understand them [the concepts]? [It is a] juggling act and something that I am legitimately confused about and my role in this whole process." At first Majewski interpreted his comments as regarding whether UCSB students have the skills necessary to consider threshold concepts in survey courses, but after further thinking, he thought TA4 spoke to the issue of students "lack[ing] the basic contextual knowledge that we need to focus on that before we think about threshold concepts." Majewski wondered aloud:

I see what he is saying that they come in with and if this is true then this is something [for] a department discussion, [faculty] are very sensitive to this idea, that the threshold concepts in history revolve around context and students need to have content.

I disagree philosophically. Because the basic contextual knowledge will just be meaningless to students unless they know why. And why am I learning this? Because context is important to answering these questions. And then getting students to think about why are these questions important and do they come from competing narratives. So you need both and I think he says that at one point and then backtracks on that.

But the fact that it is ambiguous speaks to ... I think he is speaking to the conflict historians often feel about this sort of stuff.

In the excerpt above, Majewski acknowledged the ambiguity surrounding TA4's reflections.

While TA4 acknowledged the necessity to understand meaningful and contested narratives as a concept, he still questioned the necessity of teaching this to students. Majewski recognized the familiarities of this issue since he mentioned that faculty in the department are also sensitive to achieving the balance between context and content. He legitimized TA4's concerns as those of experienced historians and teachers.

When I mentioned whether TAs saw themselves within these thresholds, I pointed out TA1's excerpts where she described the experience of coming into history graduate school without a history background. She described her experience of learning the historical strategies through one of her required courses in her first year. I asked Majewski if there was a required historiography course where graduate students examine how one reads historical monographs in order to understand how it is written. He said that these courses existed but the focus of them shifted depending on who taught it. In TA1's case, Majewski spoke to the purpose of the course she took in her first year:

She has been through history 290, [which] is all about historiography of U.S. field that gets inevitably into a lot of these issues like why have different questions shifted in the historiography? How do historians think about slavery now than they did 30 years ago? So it may be implicit, but it is implicit at a level that she can be making connections, I think.

But on the other hand for graduate students to think about defining history as a form of thinking rather than as a specific context ... it seems that this is a threshold she is moving towards and is grappling with.

Two interesting items emerged from this excerpt: his statement on the strategies and methods of historians were implicit in first-year courses; and, through this, he specified TA4's conundrum further by saying the shift that TAs could have been grappling with was more in the way one approaches the discipline-- learning about disciplinary thinking versus approaching the discipline as context on the past. For someone working diligently to make historical thinking explicit to undergraduates, his statements contradicted his own efforts. Both items contributed to the idea that TAs, in their development as historians and teachers, could also benefit from an explicit emphasis on historical thinking in their own work. Furthermore, where this explicit emphasis for TAs could happen shifted the conversation to the purpose of the weekly TA meeting and the purpose of lesson plan development.

Lesson Plans & Weekly Meetings. The discussion on lesson plans emerged from looking at TA2's comments about when he did not follow a lesson plan for the Abraham Lincoln week. When I asked the professor about the utility of the lesson plans, he said the following:

In some ways, I'm not at all surprised that the TAs did not directly use each other lesson plans. I wouldn't recommend using it because it is not yours but it spurs you to think and maybe do it in different ways or maybe work with particular sets of questions, this is something to incorporate.

In the excerpt above, he described an implicit assumption for using lesson plans that led to him stating the type of clarification he would make around lesson plans in the next iteration of the course:

In my experience they do what they want to do regardless and this shows it. But I'll make it clear as to what we're doing and why we're using the lesson plans and that it is mostly a way to structure discussion and contribute and jumpstart to your own thinking but not as a replacement for your own thinking. It would be hard to conceive of using somebody else's discussion plan without some revision just because we all have different styles and personalities so I'll do that.

Revealed in this comment was an admission that he had little control over what the TAs did in their discussion sections yet he recognized it would be helpful to clarify the purpose of the meeting and the purpose of the lesson plan. I supported this idea saying that the weekly meeting seemed to be a venue to address these concerns, especially given the little teaching experience TAs had. They could benefit from his guidance. When I mentioned the meetings, Majewski stated:

Getting the [graduate] students to talk about the material, I found difficult. They didn't want to in some way and maybe the misunderstanding of the lesson plans is part of that? Like 'oh well this is a lesson plan we're supposed to be using'? Well, no it is not, it is a jumping off point so maybe that would be helpful. But it is interesting they all said it was useful in their evaluations. But sometimes we would only meet for twenty minutes so how helpful could that be? They looked like they got it under control, if you guys don't want to talk then I don't need to be here.

In the excerpt above, Majewski expressed frustration at the lack of discussion in the meeting regarding the weekly meetings. At another point in our discussion, he attributed the lack of discussion to the TAs being from fields other than U.S. History. It connected to his earlier statement around the idea that the TAs did what they did in their sections regardless of the direction he could have provided. As a reminder, this was the first quarter the professor had engaged in a study to determine what embedding historical thinking would look like so there were multiple factors for him to consider. At this point in the interview, we had discussed the inherent struggles of two of the TAs, the purpose of the lesson plans, and now the purpose of the weekly meeting. He expressed the challenges of his own role in managing this complex system and the participants within it:

It's always a real challenge for me ... the lectures take so much time and then the student issues take so much time that kind of being able to interact with TAs in a way that is helpful to them is a real challenge.

In this statement, Majewski outlined the various factors entailed in running a large lecture course. These issues, coupled with the integration of historical thinking lectures, outlined, for him, the multiple areas where embedding threshold concepts needed to be addressed. If concepts were to be adopted by students, he needed to address what the TAs were doing in order to align expectations and practices within the course. The interview led him to delineate what he would do differently in the next version of the course in Winter 2014:

When I think about changing the course my initial inclination is lecture, then assignments, then sections. Well, in some ways it should be the sections that are the most important part of the course so this is really interesting to me to be reminded of how important that is and that link is critical. So it gets me thinking about what to do and some of the things I might do next time.

In looking at the salient excerpts from discussion section observations and interviews, Majewski decided to address three areas in the next version of the course: making historical

thinking explicit to TAs, explaining the purpose of lesson plans in the TA weekly meeting, and, how focusing on these two things together, could contribute to his renewed focus on what occurred in discussion sections.

Conclusion of Winter 2013

The first attempt to embed threshold concepts in a large course provided a snapshot into the dynamic structure of a large lecture course. The place where concepts could be seen most were in the discussion sections in how the TAs framed them for students. Within these discussions, the concepts were traced from professor to TA to the students. However, through this snapshot, the importance of the TA's role in translating these concepts seemed a vital link between Professor Majewski's intentions for student learning and the students. The extent to which these concepts were translated and framed indicated the viability of the concepts within a course, or learning system, to travel from professor to students. Not only is the TA role crucial, understanding the backgrounds, dispositions, and attitudes of TAs around teaching and teaching history contributed to understanding what they were capable of in terms of translating concepts. With this information in hand, Majewski decided to focus on the TA role as the link to extending threshold concepts into the discussion sections in order to give students opportunities to practice them. His original intent was to make historical thinking explicit to students; however, the results of Winter 2013 indicated he also needed to make historical thinking more explicit for his TAs. If threshold concepts were to move seamlessly through the system of a large-lecture course, then TAs had to be considered as instrumental in this movement.

Winter 2014

In tracing the careers of the concepts in the course and the capabilities of the professor and TA to do so, I will examine the weeks preceding the start of winter quarter 2014. The data for this quarter is not as extensive as Winter 2013, but I will outline key events that led up to the framing of the first week of the course. It appeared the professor maintained an intentional focus on framing his thinking on historical thinking for the TAs in the weeks leading up to the first week of the quarter. The framing for the TAs was to ensure that they would be able to address the concepts within their own discussion sections.

Targeted focus on TA inclusion in applying the threshold concepts

Majewski and I had a brief meeting in November 2013 to discuss additional data I might collect to add to my findings. During that discussion (unrecorded), we discussed his plans for continuing with the historical thinking lectures as he did in the prior year. With one lecture in particular, the analyzing primary sources lecture, I reminded him of the timing from the previous year where the TAs discussed primary and secondary sources in the first week while he did this lecture in the second week. In terms of reinforcing the concept, I suggested that he consider the timing of this historical thinking lecture to either coincide with the TA discussion. Furthermore, I suggested combining the primary sources analytical strategies (*See Table 9. Comparison of strategies*) into a new primary reading source guide that reflected what he emphasized in that lecture combined with what the TAs I observed emphasized in their discussions. My goal was to create a resource that was context-specific to History 17B, rooted in Majewski's thinking on these crucial actions, and clear enough for TAs to see their own practices within it as well. At this meeting, he did not mention that he had planned to write the *Five Keys to Historical Thinking* document.

First TA Meeting in December 2013. This opening meeting served as an introduction to the course, an introduction to new (and old) TAs, to review the syllabus, and to determine staffing of discussion sections. There were nine TAs in the course: TA1, TA5, two of Professor Majewski's graduate students, two TAs who taught in Winter 2013 but whom I had not observed, and three newcomers to the History 17B.

Majewski had three documents for them to discuss: the syllabus [Appendix G], a TA Guide [Appendix H], and a document called the *Five Keys of Historical Thinking* [Appendix I]. He reviewed each document with the TAs. The first thing I noticed in the syllabus was the removal of the indications of when the historical thinking lectures would take place. This differed from Winter 2013. The only explicit historical thinking lecture written on the syllabus was the first day of class and it was titled, "History as a Way of Thinking," as opposed to the 2013 version of "Introduction to Historical Thinking." After this first mention, there were no other lectures listed. This was an intentional shift that Majewski later explained in his interview a month later.

Then he discussed the new document, *Five Keys of Historical Thinking*. Briefly, the five keys (with extensive explanations beneath each one) to historical thinking on the document were titled:

1. History consists of **meaningful and competing narratives** about the past.
2. The meaning of any given historical narrative is often tied to the **present**. Historians, though, are always fearful of importing the present into the past.
3. Historians strive to be as accurate as possible, but they also know that the narratives they produce reflect their own **perspective** and personality.
4. History is based on sources and artifacts, but their meaning critically depends on **context**--the time, place, and circumstances in which they were produced.
5. Historians must practice **intellectual empathy**—the ability to put yourself in somebody else's shoes—but still maintain the ability to judge historical actors.

He launched into a lengthy explanation for the origin of this document based on his work with Adler-Kassner around threshold concepts. Before he referenced the work of Meyer and Land (2005), but this time he framed the threshold concept framework in his own words for TAs:

Part of our research revolves around this big theoretical framework called threshold concepts. And the idea is that every discipline has a set of fundamental principles that become so well known to expert practitioners, and that would be us ... that they are really hard to teach to students.

These are often paradoxical and they are the fundamental concepts that we take for granted. Often these threshold concepts are not explicitly taught because students are expected over time to encode them.

One of the things that is really useful in thinking about threshold concepts, is that they are transformative. Once you fully integrated a threshold concept, it's like learning that 2+2 is 4 and you can't unlearn that.

For example, you can forget the Kansas-Nebraska Act, but you can not forget, if you really know it, that history consists of competing narratives.

When he mentioned this example, all the TAs expressed their agreement to this idea in unison. He mentioned two threshold concept characteristics to help explain their fundamental nature to the discipline in describing these concepts as “paradoxes,” meaning they represent troublesome knowledge, not easy to figure out at first; and the idea of the concepts being “transformative.”

One TA interjected an idea to connect to what Majewski just said, “So it's like the question of ‘why do we bother to still study history because all the books have already been written’ and you have to explain to them [students] that this gets back to the #1 [pointing to the first key of historical thinking].” The first key he pointed to was the meaningful and competing narratives key. Majewski affirmed this thought and added, “This is really challenging for historians because I like to incorporate that threshold concepts in a very

explicit way into the teaching. I tried last time to do it with mixed success. Now I feel I have a better handle on it and I can integrate more thoroughly.”

The same student interjected again asking if they could reference the *Five Keys* in the weekly TA meetings. To which Majewski responded:

I want them to get the big picture thinking of how historians operate but we also have to teach them the stuff about 19th century US history. The real challenge for historians with teaching with historical thinking is that you can't teach historical thinking outside the context of teaching history.

This is because and it gets back to #4 on the list that context is critical for historians. So we're always emphasizing context, so for them to learn historical thinking, they have to learn the context which means they have to learn the material. This is going to be the real challenge for us.

In the excerpt above, I interpreted this explanation as deriving from TA4's comments in Winter 2013 relating his struggle to achieve this balance. Majewski explained that this was a challenge in teaching history for them to consider. He added:

It is a new approach to the survey and to teaching general education where we often think about introducing students to a wide variety of disciplines but we don't talk enough about what those disciplines mean and how thinking in those disciplines are so different. And we want to be really explicit about that.

Here Majewski highlighted another justification for teaching historical thinking in context of the general education requirements. The same TA asked again if they could discuss the *Five Keys* in the weekly TA meetings.

Maybe in our meetings when we talk about primary sources for that week as a group, maybe we could keep referring back to this [Five Keys] and discuss which way those readings refer back to specific threshold questions -- and incorporate that into section and if we do that often enough and subtly enough ...

In this excerpt, the TA suggested referencing the *Five Keys to Historical Thinking* when discussing the primary sources for the week in order to integrate the concepts in a sustained manner throughout the quarter. In effect, he mapped out a game plan for himself for embedding the concepts in sections in an intentional, deliberate way.

Majewski used this comment to segue to discussing the other new document, the *TA Guide*. This document outlined general guidelines for the discussion sections: required length of discussion and it emphasized that they had to teach through discussion, not lecturing. He then added,

I also want you to incorporate in every section one of the *Five Keys to Historical Thinking*. You don't have to spend 15 minutes, bring it up in the beginning or end or one point in document that demonstrates it and there will be lots of interesting possibilities to do that. And that does lead back to the weekly meetings and we'll have an expert each week lead the discussion. One of the things the expert can do is think about how we can tie the historical thinking into the material.

Majewski affirmed the TA's repeated interjections that they will incorporate historical thinking into the weekly TA meetings. Additionally, he described their role as in developing lesson plans as being the "experts" for the week. This was a minor shift in terminology for the TAs, however, this led up to his explicit description of how their expertise will play into the development of a lesson plan:

So the expert is going to provide a study sheet or study questions. You are not beholden to that. If you want to use that as the foundation or add to it, use it as a resource. There's too much reading to cover so you'll have to make choices about what you as a TA want to privilege. Use the material, but come up with your own lesson plan.

Lesson plans that someone else wrote are like lectures someone else writes. They're better than nothing but you can always tell when it is not yours.

I would make it your own but use what you'll have [from the weekly meetings] as something that is a useful resource for you.

Here, Majewski directly addressed what we had discussed in his 2013 interview about the role of the TA in creating lesson plans. He even described it as a "study sheet/questions" lessening the curricular nature of the term "lesson plan" to emphasize the key questions for discussion.

Finally, Majewski asked me to explain my research and what I had done in 2013. I gave a brief overview of what I had done in 2013 but added that I could share examples of what historical thinking looked like in discussion sections at the next TA meeting. Since Majewski mentioned that there were ways to incorporate the *Five Keys* in sections, I decided to pull examples out of the analysis of each of the four concepts to demonstrate the careers of the concepts for this new group of TAs. This opening TA meeting displayed evidence of the renewed focus on TA management that Majewski spoke about in his 2013 interview. He created the *Five Keys to Historical Thinking* guide for TAs and students in addition to the TA Guide. He spent more time explaining his own thinking on threshold concepts and how it played a role in the development of the course. He also defined their responsibilities to the weekly TA meeting as being weekly “experts” sharing lesson plans that incorporate historical thinking. All of these added scaffolds framed the emphasis on the concepts Majewski wanted to emphasize and how he wanted the TAs to emphasize this framework as well.

Interview with Majewski on the Five Keys to Historical Thinking Document.

With the new addition of the *Five Keys* document, I interviewed Majewski in the second week of the quarter to discuss the origin of this document and how it derived from past conversations around what he saw as the threshold concepts of history. To facilitate this, I brought copies of his statements on threshold concepts from the spring 2011 focus group and our fall 2012 discussion to discuss alongside this new document. In addition to discussing the origin, I asked him to clarify the purpose for using “historical thinking” terminology versus using the term “threshold concepts” in the document. Finally, I asked him to discuss how he hoped TAs would use this document.

Table 13. Majewski's Evolution of Threshold concepts in History		
Focus Group 2011	September 2012	December 2013
<p>Understanding the complex relationship between the past and the present. How the present shapes your understanding of the past and the past shapes our understanding of the present and that kind of complex back-and-forth.</p> <p>History as a sophisticated discussion or argument about the past;</p> <p>The use of evidence to support your points; how you use evidence in logic.</p> <p>Transferring the skills of analyzing evidence and making logical connections into your written work</p> <p>Making persuasive points in sections</p> <p>Practice using primary documents, actual artifacts produced by the past in constructing persuasive historical arguments.</p>	<p>Complex relationship between present and past: This concept alluded to presentism which he defined as the “Goldilocks” approach to viewing the past through the lens of the present; the importance of understanding this concept is attached to establishing context.</p> <p>Historians borrow theories: Skepticism around application of theory to historical analysis therefore they borrow theories from other disciplines (e.g. Foucault, Keynes, Bourdieu, etc.)</p> <p>Use of evidence: How historians use primary sources</p> <p>Narrative and context: Information is linked and gives meaning to other pieces of evidence; history as analytical narrative; also one of competing narratives</p>	<p>The meaning of any given historical narrative is often tied to the present. Historians, though, are always fearful of importing the present into the past.</p> <p>History consists of meaningful and competing narratives about the past.</p> <p>Historians strive to be as accurate as possible, but they also know that the narratives they produce reflect their own perspective and personality.</p> <p>History is based on sources and artifacts, but their meaning critically depends on context--the time, place, and circumstances in which they were produced.</p> <p>Historians must practice intellectual empathy—the ability to put yourself in somebody else’s shoes—but still maintain the ability to judge historical actors.</p>

The origin of the *Five Keys*, according to Majewski, came from the focus groups and the faculty interviews conducted by Adler-Kassner in Fall 2012 (Adler-Kassner & Majewski, 2014, in press). He stated that he approached the document as a chance to encapsulate how

he would articulate threshold concepts in history at that point in time for students and TAs.

When I asked how these *Five Keys* corresponded to the historical thinking lectures he planned for 2014, he explained:

One of the things I'm trying to do is make it seamless and I got rid of the designation, "historical thinking lecture" [in the syllabus] because every lecture should be embedded with historical thinking.

Sometimes it is just a matter of 50-second way of introducing a lecture ... sometimes it is full-scale historical thinking [lecture] where we talk about how to read primary documents. And it's doing it the second time around, I can see more points like, 'ok this is where I can bring in one of the points.'

For the Winter 2014 course, Majewski planned to do four "full-scale" historical thinking lectures, the same four analyzed in Winter 2013 (contested narratives, analyzing sources, historical empathy, and thesis statements). However, he explained his new approach would incorporate or reference the historical thinking keys within his lectures throughout the course. The key difference from what he did in Winter 2013 was this new approach for making historical thinking explicit through repeated references. Historical thinking would not only be made explicit in four targeted lectures, it would be made explicit at key points within every lecture, causing more spontaneous connections. He further explained how the *Five Keys* provided a framework into which he could situate his existing content and

Powerpoint slides:

I can bring the points back in, so I have the lectures [the content lectures], and then I developed the [key] points and it is easy to bring the points up at relevant places in the lecture. That's how the process works. I'll refer to it [*Five Keys*] explicitly. And so I'll be doing that from time to time throughout the quarter.

In the excerpt above, he stated how the *Five Keys* served to illuminate relevant parts of his lecture and this would be his process for the upcoming quarter.

When introducing the *Five Keys* documents to TAs in Winter 2014, Majewski framed the document through a full explanation of his views on threshold concepts in history. At one point, he described the *Five Keys* as the “big picture of how historians operate,” an overarching framework of principles for the course. Then when he started talking about teaching these concepts, he switched to talking about teaching “historical thinking.” I asked him to clarify why he preferred to describe the concepts as “historical thinking.” At first, he explained he did not want to introduce that term because Adler-Kassner often refers to the term as a threshold concept in and of itself (Adler-Kassner, 2014). He then discussed the role of threshold concepts within a discipline:

Threshold concepts are great especially when I’m talking to different audiences from different disciplines, every discipline has these threshold concepts, but you can define threshold concepts as a way of thinking about the world -- I don’t think that is not that big of a leap. So it makes sense for me to put it in concrete terms and this literalness, this is how historians think, is both true and helpful.

In a way a discipline is just a group of people and threshold concepts are describing how this group of people thinks. It is different, rarified thinking with this paradoxical nature but it makes sense to me and I sense it is helpful for students.

His concern was that the term “threshold concepts” would diffuse the purpose of making the acts of thinking and doing history more transparent. While the difference might have been mostly semantic, Professor Majewski considered what would make most sense to the students when thinking about the lectures. This represented an important distinction, in that the *Five Keys* served as the conceptual framework governing the course structure; translating these concepts into concrete terms for students involved delineating the necessary actions to understand those concepts.

I asked what he hoped the TAs would take away from the *Five Keys* document. His responses were expressed through the lens of empathy in that he acknowledged they were in

the midst of “learning the craft of teaching” and there was little room for this type of meta-reflection on the core principles and actions of the discipline itself:

I hope the TAs begin to do what I’m doing in lecture and not [make it] heavy-handed and [such as] ‘that’s a great point and it goes back to his HT concept and the relationship between past/present and the concept of empathy and how do you do that.’

I guess ... this goes back to the challenges to the first time teacher and there is so much in the way of fundamentals that you are trying to grasp and you don’t have the space for meta-analysis what this is all about (pointing to 5 keys document) so what I hope I’m introducing slowly and gradually to them that they also need to be thinking about this meta-analysis which I didn’t start thinking about until 4 years ago. I’ve been teaching for 15 years but not really focusing at all on meta-analysis of what we’re trying to do in a history course.

In this excerpt, Majewski hoped that through his modeling of making connections between the *Five Keys* and the content during lecture, the TAs would also use that same model. In addition, Majewski acknowledged, again, his role in helping TAs become aware of their role as teachers within the discipline just as he had been doing in recent years. At the same time, this posed a challenge for him. During the conclusion of the interview, we discussed his role in relation to his group of TAs and the challenges he faced with managing their approach to the discussion sections:

I constantly need to be reminded that I am also teaching the TAs too and it is an obvious point, I get so caught up in lectures and I forget about the role as course manager and making sure these concepts get to the TAs and spend time thinking about how the TAs are disseminating them.

In the excerpt above, Majewski reiterated the importance of his role in teaching the TAs in order to promulgate the careers of the concepts in his course. Through this interview, Majewski displayed more of a focus on where and how he could contribute to the elements of the course where concepts would have an impact on student learning.

First TA Meeting of Quarter. The TA meetings immediately followed the professor's first lecture of the week, whereas in the previous course the meeting occurred prior to the first professor's lecture of the week. In this meeting, the significance of this scheduling shift afforded the professor and TAs to discuss the weekly themes and readings in context of the lecture that just occurred. For this meeting, Majewski outlined what he thought should happen in the TAs' first meetings with students, he discussed how he wanted the TAs to use the new primary source reading guide, and he offered a suggestion for tackling the first reading (Andrew Jackson veto letter, Majewski, 2013). In effect, he framed for TAs how he wanted them to frame the threshold concepts (or *Five Keys* in this case) within their own sections.

First, he explained that he wanted them to emphasize the primary source reader for at most twenty minutes. He encouraged them to emphasize the importance of primary sources by having them analyze the Andrew Jackson veto letter. He asked the TAs to let students "read it and make sense of it" to reinforce the notion that analyzing primary sources was a major part of the course.

Then he transitioned to the new primary source reading guide I had developed [Appendix J]. The reading guide used in 2013 and Majewski's historical thinking lecture on analyzing primary sources provided the foundation for the guide. The intention for the guide was to reflect the specific aims Majewski had around analyzing sources while integrating the individual TA strategies used in 2013 – it was designed to reflect the context of this course and the framing strategies used by TAs in 2013. Excerpts from Majewski's analyzing primary sources lectures served as explanatory text for each question to ask about a source. I

explained the foundation of the document before Majewski explained how he thought they could use this guide:

I can see this as being really helpful and being a good strategy for introducing students to the ways in which we read primary sources and signal to them right off the bat the importance of these primary documents to the course. That is really important [this] first week.

Apart from the emphasis on using the guide, Majewski stressed the importance of primary documents in the course as opposed to the importance of the discussion of the difference between primary and secondary sources that TAs did in 2013. I asked the TAs how they referenced the reading guides when they had taught this class previously. TA5, the TA who stated in 2013 that he had not handed out a guide, stated that, “I used the guide as a frame but I don’t go through the steps every time.” To which Majewski responded:

I wouldn’t suggest doing that, but use a light touch. Say to students, ‘in your reading guide, context is important.’ We don’t want to make it mechanical. Refer to it in general ways at certain points. And there will be times you can refer to it when there will be discussions where they are missing something really basic.

Majewski, in this response, encouraged the TAs to use the guide as a reference point when looking at documents, particularly when TAs encountered a discussion where students would miss basic connections between the source and the historical context. Then he stressed an important point about making the guide a substantive part of the first week’s discussions:

It won’t change what you teach. But it gives students a useful reference point ... if you just give it to students in week one, talk about it, and then forget about it, it becomes filler.

But if you introduce it to students and talk about it, with a light touch, and refer back to it over the quarter it will give students reinforcement [to] the ways historians think about primary sources. And I’ll give that reinforcement in lecture as well.

While it could be contested if it would change what they teach, he made an important point about taking advantage of the first discussion section with a crucially important element of

the course. The added notion of reinforcing the guide in sections and lectures signaled to the TAs that this was Majewski's expectation to maintain this alignment within the course. With a quarter consisting of only ten weeks, time was scarce in the course. Majewski gave the TAs a tool to facilitate the efficient movement of the careers of the concepts in the course.

Following the reading guide discussion, Majewski asked the question he asked in 2013 about what the TAs liked to do on the first day of discussion. One of the new TAs (in her second quarter of teaching) asked how much time to devote to reading the Andrew Jackson veto letter. So Majewski elaborated on his earlier statement about spending time on Jackson in order to emphasize the role of primary sources in the course:

If you have 20 minutes to go over it, they could read sections of it that you think might resonate with them, [such as] when he talks about inequality, you could have them read a paragraph or two. Then introduce the reading guide as well.

For this new TA, he suggested paring down the reading of the Jackson letter or choosing specific points to analyze. Again, he coupled this suggestion with reading the letter with the accompanying reading guide. He then brainstormed two more ideas for the TAs in regards of what to do with the Jackson letter. The first idea:

As I'm talking aloud about this ... it may be a good strategy to talk about Jackson briefly this week and then go into it more in week two. And just thinking out loud here ... and that also has the advantage of hearing me talk about domestic ideology next week where they'll hear me, talk about primary sources.

In this idea, Majewski suggested talking briefly about Jackson given the indeterminate amount of time TAs would have given logistical issues. Then he suggested building on the brief discussion in the second week along with the other required readings. Then he reminded the TAs that he would do the analyzing primary sources lecture at the beginning of the week to further reinforce the strategies needed to read the documents. He foregrounded

the next historical thinking lecture for them; this type of foreshadowing did not occur in 2013.

The second idea Majewski mentioned in relation to the letter:

The other thing that occurred to me as well ... it would be gutsy to do this ... but if you have some outgoing students, you could have them read aloud the source themselves. Say, 'volunteer and I want you to read a paragraph and let us know what you're thinking as you read the paragraph,' [Ask questions like] 'I don't understand this,' 'what's he saying here, am I reading this?' And just see what they make of it.

In this spontaneous moment of brainstorming, Majewski challenged the TAs to ask students to do a think-aloud in the same way he did a think-aloud in his analyzing primary sources lecture. Only one TA implemented this idea during the first week of discussions (TA1, the novice graduate student who showed moments of translation and framing in 2013). This TA meeting differed from those in 2013 in that Majewski took the time to explain what he hoped TAs would do in their initial discussions with students. The 2013 TA interviews indicated that they look to these meetings to gain perspective on the professor's perspective for the week. On Majewski's part, it appeared that he recognized that the TAs looked for direction for the week and he utilized the time together to frame his direction within the concepts that mattered to him for that week's content. The additional tools and scaffolds supported the processes he conveyed in his historical thinking lectures.

Winter Quarter 2014: Concept One: Historical Thinking Lecture: Meaningful & Contested Narratives

Professor's Lecture: History as a Way of Thinking. In his opening lecture, Professor Majewski established the "regime of competence" of the course: a system of learning that facilitates the development of a perspective, using particular tools and methods to participate within the discipline (Wenger, p. 180). Majewski used these particular elements: perspective, tools, participation, in describing the goals of the course; especially, the perspective he wanted students to take as a result of this course. Again, this regime was

set in place in order to support the movement of concepts through the large course.

However, his regime differed in name, time, and organization from the 2013 version. It also differed in approach in that the TAs had more advanced time in which to discuss this regime with Majewski. In this instance, the TAs were more of a part of this regime than in 2013.

In terms of the title of this lecture, on the 2013 syllabus, it was titled “Introduction to Historical Thinking” and the 2014 version was, “History as a Way of Thinking.” This switch stemmed from Majewski’s definitions of the discipline, in his 2014 interview, as encompassing a world view; in this world view was a rarified form of thinking that was distinct from other disciplines.

The organization of the lecture was more condensed thus it lasted ten minutes as opposed to sixteen in 2013. In the previous iteration, he emphasized how to define history (not just the study of the past). In addition, he defined meaningful and contested narratives, discussed how history was different from other disciplines, and he spent time on discussing the role of writing in history. He ended with a justification of why students should even learn how to think like an historian. In the new regime, Majewski talked what the course entailed along three levels: learning content, putting content into a framework, and writing a narrative.

For the content, he acknowledged a common assumption about history that it was full of dates, facts, and “stuff.” But he couched these aspects as what they have to learn about the 19th century as part of the “building blocks of history.” This led to the second level about situating this “stuff” within a framework, a historical framework. Majewski stated, “you need that stuff, but you also need to learn the framework of how historians use that information to build narratives ... history is not a given set of information, but history is a

way of thinking about the past and this is one of the big goals of the course.” Then he referred to the *Five Keys* document telling them it would be on the course web site and it would be “something we will refer to in lecture and section.” He did not reference the document during his explanation of these three levels. Within the final level, he discussed the issue of disciplinarity that he broached in the 2013 version. But he linked the idea of different disciplines thinking in different ways to the ability of the historian to write narratives. This led to a more concise definition (versus the 2013 version) of a meaningful and contested narrative:

What historians do is they write meaningful, significant stories in which things change over time about the past -- that is the essence of historical thinking. These stories are meaningful, they call to us in a certain way and because those narratives are meaningful it means that history is tied to the present. This is how history ties together the past and present. If meaningful, they will be disagreed -- if it has meaning to people, people will find different meanings.

In 2013, he had time to use examples, specifically from the Civil War time period, however, the class was ending so he did not have time elaborate further. This first lecture provided a cohesive set of ideas for students to consider around what they will learn and how they will go about learning them. Next, I will trace the career of this idea that form this portion of the regime of competence, reflecting the extent to which TAs took up the concepts incorporated in this new regime.

Winter 2014: Concept One: Meaningful & Contested Narratives in TA Discussions

Table 14. 2014 Concept One and the Stages of Uptake of Concepts

	TA Stage 1: None	TA Stage 2: Minimal	TA Stage 3: Translation	TA Stage 4: Frame
Concept 1: Meaningful & Contested Narratives Lecture				TA1
			TA6	

			TA7	
				TA8
				TA5

By the time TAs entered their first discussion sections with students, they had met with Majewski about the *Five Keys of Historical Thinking* document; they had received examples of historical thinking in discussion sections from the 2013 course; and Majewski gave multiple suggestions for how to tie in the primary source reading guide (PSG) to the discussion. The framing of how to incorporate the course concepts, preceding the first discussion sections, was substantive in terms of providing necessary tools for the participants within this “regime of competence.” The career of this first concept traveled throughout each discussion section I observed with each TA referencing the new primary source discussion guide. In addition to observing TA1 and TA5 from the previous version of the course, I observed three additional TAs: TA6 (first time teaching History 17B), TA7 (second time teaching History 17B, but I did not observe him in 2013), and TA8 (first time teaching History 17B).

TA Stage 3: Translating the Concept. TA6 and TA7 both conducted ten-minute (or less) discussions in their first week with students.

TA6. In TA6’s case, his reason for not going longer was that his first section of the day had logistical issues that prevented him from analyzing the Andrew Jackson veto letter; he wanted all of his sections to progress at the same rate therefore, he decided to forego the analysis exercise. Despite this, he discussed the new primary source reading guide and framed their discussion within establishing goals for their discussion sections within the

course. TA6 handed out his syllabus to his students with the reading guide photocopied on the reverse side. He explained:

This is a list of the key points to look for when you are reading primary documents. Things to consider, this will help you as you read through the documents. It's in line with Majewski's aims for the course to think like an historian. The majority of our discussions will revolve around primary sources. And that's why the primary source reading guide you want to look for context in discussion.

He repeated almost verbatim what Majewski hoped TAs would emphasize in terms of primary sources. He then added:

I know people have different majors and wondering why it is required and what it will do for me, well for one it's going to provide that writing foundation. You're going to be able to construct a pretty persuasive paper that is supported with details. This will be applicable across disciplines. If you're in the sciences, if you're writing a grant application you have to persuade the committee that your work is worth funding.

Picking up on Majewski's third point about disciplinarity from the opening lecture, TA6 expressed to students what the course would give them in terms of writing skills and how this could be transferred to other disciplines. The career of this concept of thinking about narratives extended to this discussion.

TA7. TA7, the other TA with a ten-minute discussion, reviewed his syllabus with students. He did not hand out the primary source guide, but he did frame the course goals along the lines of Majewski's opening lecture, particularly emphasizing what he viewed as important:

Professor Majewski talked about some of the different ways historians work. I really just want to emphasize the centrality of constructing narratives to the historical profession.

So we'll spend a lot of time focusing on who is preparing these documents? Who is writing them? Who do we think their audience will be? How would we gauge the reception we think these documents met at the time. And we'll evaluate them and put them in dialogue with one another and see if we can come up with our own

conclusions, make our own historical arguments. History is about that, it is about making arguments.

Again, TA7 taught this course in 2013, so he delivered this “pitch” (as he called it) at the very beginning of class. He wanted to focus on the idea of constructed narratives most of all at this juncture. He followed this statement with brief introductions from the class and then ended it. In terms of extending the career of the concept in his section, he translated the notion of a contested narrative for students as something he would emphasize throughout the quarter.

TA Stage 4: Framing the Discussion.

TA8. In her second quarter teaching a history graduate course, TA8 planned an agenda for the entire meeting time. Part of her agenda entailed discussing the difference between primary and secondary sources, prior to talking about the primary source reading guide:

The last handout is one that is essential to this class: primary Source reading guide. Every week we’ll go over a primary source. What this handout does is it helps us go through how we break down and make sense of a primary document.

First off, let’s start off with the basics. What is a primary document? Because historians throw that out a lot.

Following this brief discussion, she asked students to break into groups to read the Andrew Jackson veto letter. At this point in the discussion, I had to leave the observation. I followed up with the TA via email to ask her how the discussion went. She mentioned that some students asked for clarification around the document (reading guide encouraged students to discuss what confused them). She also asked students if Jackson was pro-/anti- market revolution incorporated Majewski’s lecture from that day. She wrote in the email, “I mentioned that historians still debate this question and, conflicting opinions are possible. One student believed that he was pro-Market Revolution because of the benefits it provided

farmers. Others felt that he was against it because it made the rich richer and the poor poorer.”

She highlighted the notion of contested narratives through her questions. Finally she wrote,

Our most fruitful discussion came when I asked a question about relating the document to the current economic downturn and current economic inequalities. Several students mentioned the similarities between Jackson's comments and the Occupy Wall Street movement. I followed it up with emphasizing a point Professor Majewski made in lecture today about how significant the present is to historians.

TA8, in what she shared from her perceptions of the discussion, demonstrated two things in this exchange. The first was that she questioned students about the issue of inequality within the veto letter that Majewski suggested in the TA meeting that week. Because she asked this question, she thought the discussion was “fruitful.” Second, she demonstrated the new approach by Majewski in mentioned the *Five Keys* intermittently throughout his lectures. That morning in lecture, he referenced one of the keys of historical thinking (relationship between the past and the present) so she demonstrated an ability to weave that aspect into the discussion. Through her intentional, deliberate instruction she framed the concepts for her students extending the career of the concept for students.

TA5. TA5, the TA who infrequently incorporated concepts in his discussion section in 2013, differed his approach to the first day of discussion of the section I observed in two ways: first, he spent time discussion what historians do and second, he referred to the new primary source reading guide. Prior to the discussion, I walked with TA5 to the classroom. During the walk, he expressed to me his doubt about the first section he taught that day. When I asked why he said it felt disorganized and he decided to skip the Andrew Jackson analysis. In terms of the length of his discussion, in 2013, TA5 held a ten-minute discussion focusing only on the syllabus and course policies with no mention of Majewski’s lecture on

contested narratives. For this time around, he talked with students for thirty-five minutes.

Within that time, he asked students the following question prompts:

- What do historians do?
- What problems do biases present historians?
- A big part of the “historical method” is interpretation, what’s unique to historians in terms of their form of presentation?
- What’s a narrative?
- What do we do with these primary sources? (launched into the primary source reading guide)

At one point during this discussion with students about primary sources, he told them, “I’m working my way through this too,” similar to his comment in his 2013 interview where he commented that he was working on all of the historical thinking concepts in his own work. Within the primary source discussion, he described the strategies that historians use with primary sources as the “quintessential method of historians as it sets the stage for the context of the document.” Here, TA5 picked up on Majewski’s wish to stress the role of primary sources in the course. He asked students to list what historians do with primary sources in order for them to come up with the strategies in their own words. However, after the class, I asked him if he was working from his own list of strategies intending to find out if he was using a source of his own making or from another TA. He told me he based this discussion on the new primary source reading guide. So he framed the discussion of primary sources within the steps within the guide. The career of the concept of what historians do and how they approach a document entered into TA5’s discussion in a very transparent manner this quarter.

TA1. One of the TAs from 2013 who found herself in Stages 3 and 4, TA1 conducted her opening discussion similarly to the prior time she had taught it. In 2013, she did three important things related to primary sources in her opening discussion: 1) she had students

read it (she was the only who did so); 2) students practiced analyzing the source with the guide she gave them; and 3) she highlighted the arguments of the passage and connected it to a historical action. While she did not fully frame her discussion around the concept of meaningful and contested narratives, she did translate important aspects of analyzing a primary source that she used throughout the quarter.

In the 2014 version, only she and TA8 analyzed the Andrew Jackson letter. She began the class with the following explanation:

Professor Majewski is putting a lot of emphasis on getting you to think like historians and each discipline has a different way of reading a source and figuring out what it means and questioning it. So here we are going to spend a lot of time asking questions that historians ask which is on the back of the syllabus -- the primary source reading guide.

This is how TA1 described Majewski's goals of the course and connecting it to the primary source reading guide. She went on to describe the guide as a "fancy way of asking 'who, what, where, when, and why' but geared to what historians look for when reading sources." The "who, what, where, when, why" referenced the previous reading guide used by TAs the year prior. Even though she described the new guide as "fancy," through what she said to students, she recognized that it was more connected to what historians do versus what journalists do. As she did in 2013, she connected the discussion of looking at a primary source reading guide to an actual primary source, the Andrew Jackson veto letter. She started off asking, "what are the basics? Who is this and when was it written?" For the students who brought their primary source book, she pointed out to them that this basic context was provided before the primary source. After students discussed this basic information, she asked, "what do you know about his bank veto if anything? Do we have a national bank now?" By asking this question about the present, students responded "no" to

her question to which she said, “This veto was a big deal. We still don’t have a national bank in our country.”

Next, a student had a question related something she had read in the textbook. She asked what government granted privilege meant. TA1 responded, “I think there’s a good passage that will help us out. If you go to the second page, third paragraph ... I was going to do this exercise later, but we’ll do it now.” The exercise she referred to was Majewski’s suggestion from the TA meeting that week about having a student do a think-aloud. TA1 was the only TA who actually did this. She asked for a volunteer, “If I have a brave soul, read the passage aloud and but as you’re reading tell us what you’re thinking as you read it, are you asking a question of what this means or how do I?” Three students raised their hand to volunteer. One student, seated on the floor, began to read the passage. She paused, not at the request of the TA, but at good place to tell the class what she was thinking, “At this point I’m thinking, well, it’s Andrew Jackson, he’s a man of the people and he is trying to defend everyone’s right to equality and this is him trying to protect this virtue.” TA1 affirmed her comment and asked her to read two sentences more. Once the student finished, she turned to the student who asked about “government granted privilege” and asked, “what was the phrase [government granted privilege] you were talking about?” The student responded immediately with, “I think I’m getting it now.” TA1 directed students to look at another passage in which she pointed out Andrew Jackson’s views on what a national bank, governed by a select few, would not be in the interest of the republic. She then asked students to read the rest of the letter looking for other pieces of evidence where Andrew Jackson did not want the bank to come to fruition.

In the 2014 version of her opening discussion, the career of the concept of history as a way of thinking surfaced in her discussion in her description to students of how Majewski wanted them to think like historians and in how took up Majewski's idea of doing a think-aloud in class. TA1 expanded her capabilities to frame the discussion using the new primary source reading guide by explaining what it was and asking students to use it while reading the Andrew Jackson letter. In order to answer a student's question from the textbook, she used the think-aloud exercise to answer that question, directing students to a specific example of what "government granted privilege" meant. The one passage she had a student read illustrate one example of evidence of why Jackson opposed the national bank. So she asked students to read the rest of the passage looking for other reasons why he opposed the bank. The specificity of the question gave students a purpose to reading the source instead of reading the source solely for the purpose of practicing analysis.

Conclusion

The career of this first concept could be seen in four of the five discussion sections. The movement from professor to TA to student could be seen as a constant thread in this first week of the course. While each TA differed in their approach in their opening discussions, four of the five referenced the new primary source reading guide in some way in their sections; the TA who did not reference the guide did make a speech about the "centrality of the idea of contested narratives." The extensive framing Majewski applied in the weeks leading up to the start of the quarter demonstrated the level needed to maintain an emphasis on historical thinking within the discussions with TAs. In the very first meeting, he

presented TAs with the *Five Keys to Historical Thinking* and in the second meeting he described clearly that he wanted the TAs to stress the importance of primary sources within this course. The weeks leading up to the start of the quarter and the first week of the quarter provided a clear snapshot of the difference the focus on the TA made in how the concepts surfaced in the discussions for that week. This snapshot revealed the deliberate, conscious reflection and application of the professor to make the concepts explicit to the TAs and in how the TAs introduced the concepts in the sections.

CHAPTER 5 DISCUSSION

Introduction: Tracing the careers of the concepts in large systems

This study looked at how threshold concepts were introduced in a large lecture history course. The analytical framework for viewing the results provided a lens to look at how the concepts were introduced and carried throughout the course. This framework, shaped by the situated learning literature reviewed in chapter two, looked at the careers of the concepts and how they were woven through a large learning system from professor to TAs to students. Professor Majewski established what Wenger (2010) referred to as the “regime of competence” of the course, an outline of what the course required in terms of being a participant within the course. He did so by creating a system of learning that facilitated the development of an historical perspective, using particular tools and methods to participate within the discipline. In his historical thinking lectures, Majewski made these tools and methods explicit to students. However, as the course progressed, the key to sustaining an emphasis on this regime of competence increasingly fell in the domain of the TAs. Concepts appeared in discussion sections when TAs chose to explicitly emphasize those concepts or when they arose unintentionally. When a concept surfaced in student interviews, according to three instances, students were able to make the connection from what Majewski said in lecture and what the TA did in discussion section. This led to capturing unintentional instances of the uptake of concepts in 2013; Majewski’s 2014 shift in how he framed the concepts to the TAs produced moments of productive uptake of the concepts in the discussion sections from the teaching point of view.

In 2013, Majewski focused his efforts on developing seven historical thinking lectures to make historical thinking concepts explicit to students. Majewski did not,

however, make his thinking about how he thought they should be incorporated into discussion explicit to TAs in -- overlooking this crucial link for carrying out the careers of the concepts. Therefore, the role of the TA yielded further insight on where and how concepts can be carried through the large lecture course system. In chapter four, the discussion of the careers of the concepts revealed TA practices that occurred within student discussions in the first year of the study. The Stage 3 and 4 practices of translating and framing concepts revealed the potential for embedding threshold concepts in the course. When TAs remained in stages 1 and 2, the absence of the careers of the concepts in the discussion sections revealed possible areas where the threshold concept framework could have provided more structure to the discussion.

Whether the concept reached stage 4 or remained in stage 1, it was important to consider the TAs' perceptions of the threshold concepts as they learned them because their understanding of the discipline and teaching factored into whether or not they would incorporate the concepts into their teaching. In considering the careers of the concepts and the people responsible for facilitating student learning of those concepts, issues of identity and practice -- both central components of how information moves through a system-- played an important role in whether or not the regime of competence carried through the system (Wenger, p. 185). As TA4 noted in his interview, the threshold concept lectures came as a surprise to the TAs; therefore, their capabilities to take them up and apply them in discussions varied. Based on their interviews about their teaching experience and their perceptions of the threshold concepts, the TAs themselves were moving through liminal spaces -- "transformative [states] in the process of learning in which there is a reformulation of the learner's meaning frame and an accompanying shift in the learner's ontology or

subjectivity” (Land et al., 2014p. 199) -- regarding the threshold concepts of history and the teaching of those concepts. On some level, Majewski requested implicitly from the TAs a reformulation and an ontological shift in understanding the “world perspective” of their discipline and how to incorporate this perspective in their own discussion sections. Based on this implicit assumption, TAs found themselves within preliminal and liminal spaces in terms of connecting Majewski’s threshold concept framework to their prior understanding of history and teaching. To shed more light on the TAs’ disciplinary and teaching identities, I will discuss key moments from their interviews to show the relationship between their perceptions and their practices.

The shifts that Majewski was asking TAs to make mirrored in his own identity and practices. As his understanding of threshold concepts evolved from the 2012 focus group to his *Five Keys to Historical Thinking* document, he narrowed and clarified what mattered most to him in the discipline and in his course. These disciplinary concepts were made explicit to students through the historical thinking lectures in 2013. In the next iteration of the course, he made the concepts explicit to TAs and students in order to ensure the concepts carried through the course. The steps Majewski took in his own reformulation of his identity as both teaching students *and* TAs made an impact on how threshold concepts could be applied within a course. It also showed the difficulty and organization involved for professors in maintaining an explicit focus on the threshold concept framework. I will discuss the role of the professor and his own evolution of his thinking about threshold concepts and how he conveyed this information to the TAs. First, I will look at why the role of the TA is crucial to carrying the concepts through the system.

The Role of the TA: Identity, Apprenticeship, and Threshold Capabilities

In the situated learning literature review, I highlighted the following aspects of becoming a practitioner in a discipline: identity-development (moving from novice to expert), deliberate practice (enacting strategies), and discursiveness (making knowledge explicit). This process of becoming a practitioner within a discipline encompasses the idea of enculturation, learning the knowledge and practices required within a discipline. Based on this literature and developing expertise, I will look at the practices enacted by the teaching assistants as key capabilities to teach threshold concepts; their formation of their identity as practitioners within their discipline; and I will examine where these capabilities and identities could be cultivated within their program. In order for uptake of new ideas to occur within graduate student development, it is important to understand the prior knowledge of the TAs and where they see themselves in the enculturation process.

Based on the TA interviews, there are two parts to the enculturation process for graduate students – enculturation into the discipline and enculturation into teaching the discipline. Those two parts contain the identity one assumes in the process and the knowledge required to maintain that identity as seen in Figure 2:

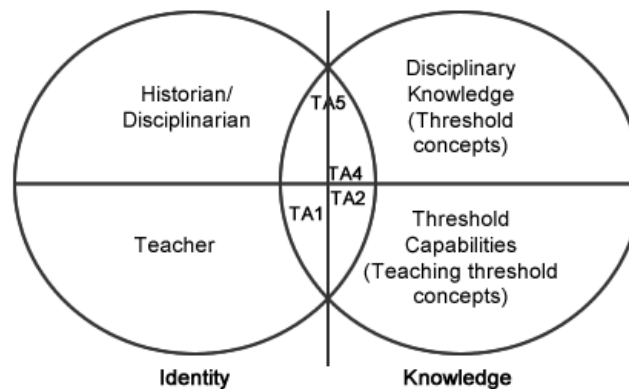


Figure 2. Enculturation process for teaching assistants in history.

As seen in Figure 2, enculturation of a teaching assistant entails learning to be in the discipline while learning to teach simultaneously. However, there are foundational concepts within the discipline, as Majewski explored in his evolution on thinking on threshold concepts, that TAs also need to take into account for their own learning and in order to connect students to this “disciplinary enterprise” (Anderson and Day, 2005). While this enculturation process does not describe every teaching assistant experience in the UCSB history department, the enculturation the TAs faced as being members of the system of History 17B involved four parts: 1) understanding disciplinary knowledge, 2) assuming their identities as historians, 3) developing their threshold capabilities to teach disciplinary knowledge, and 4) embracing their identities as teachers. Within the TA interviews from 2013, TAs aligned themselves within the intersection of these four parts. This section will look at these issues of identity the TAs grappled with, then I will look at the knowledge entailed in forming these identities and their practices that shed light on what is possible in extending the careers of the concepts from professor to students.

TA Identity. The unintentional uptake of the careers of the concepts yielded more insight into why the TAs progressed through the certain stages depending on their experiences with teaching and in the discipline. When TAs reached Stages 3 and 4, they held a particular perspective on the concept as it related to something they valued in the discipline. For instance, when TA1 reframed her discussion to include historical empathy, that lecture affected her own thinking about how she viewed historical actors; therefore, she wanted students to shift their thinking as well. Thus, she changed her approach to framing the concept within her discussion section. Bounded with the notion of uptake was the ability to see oneself in a certain way in order to demonstrate capabilities needed to take up the

concepts. I contend that the way the TA saw himself or herself within the system played a role in the degree to which he or she was able to carry the concept into the discussions.

To consider where the processes of uptake occurred, why they occurred, and how it was connected to the TA's identity, I reviewed the portions of the TA interviews that dealt with teaching experience, perceptions of threshold concepts, and the challenges of being a TA at a large university. Understanding this prior knowledge of the TAs substantiated the shift in perspective on the TA role in the course between the 2013 version and the 2014 version. In his 2014 interview, Majewski empathized with the TAs in recognizing the challenges that TAs face when teaching for the first time:

There is so much in the way of fundamentals that you are trying to grasp and you don't have the space for meta-analysis, 'what this is all about' (pointing to *Five Keys* document) so what I hope I'm introducing slowly and gradually to them which I didn't start thinking about until 4 years ago.

In the excerpt above, Majewski alluded to one important component of identity: the liminal spaces TAs find themselves in as they move from their role as graduate student to the role of teacher or facilitator of student learning in history. Teaching in History 17B offered a different form of enculturation to teaching and to the discipline than the TAs experienced in the past.

The difference within this course brought questions around the identities of the TA. The issue of identity within a regime of competence relates to the extent the participants can adopt the particular "world perspective" and engage productively with members of the community of practice (Wenger, 2010). Adopting this world perspective of the community and its practices (Majewski even described the discipline as a way of looking at the world [Interview, 2014]) involves the development of identity. This identity "shapes what that person comes to know, how he or she assimilates knowledge and information" (p. 138).

How one assimilates information speaks to the tension of combining content with an overarching disciplinary framework. This is important to consider when looking at the role of the TAs in History 17B because the discussion sections and TA meetings provided snapshots of the process of what this assimilation to the discipline looked like.

Furthermore, recent research supports the notion of situated learning principles and threshold concepts within professional development. Majewski's views in thinking about the identity of a novice teacher resonated with the idea that graduate students are developing their professional identities as historians while learning effective teaching strategies. Devitt et al. (2013) argue that "the development of a student teacher's identity as a professional is of prime importance in negotiating the liminal space of the novice teacher, rather than solely the cumulative acquisition of concrete technical and organizational [sic] skills associated with effective classroom teaching" (p. 129). In weekly reflections over the course of a year with student teachers and early career teachers, Devitt and colleagues found that when thinking about their classroom as a place to foster student learning, student teachers underwent an ontological shift in their understanding of teaching. The cause for this shift, Devitt et al. explained, could have occurred within multiple variables -- two identified were "awareness raising through interactions with theory in lectures or reading" and "surprising reactions to new techniques or methods tried at the suggestion of peers" (p. 131). Both causes contributed to the student teachers noticing a change in how they viewed teaching. These discursive practices were seen within 17B in that Majewski introduced the TAs to threshold concept theory and in some instances of sharing strategies and resources with other TAs (e.g. discussion of lesson plans, using one another's primary source reading guides.)

In another study speaking to the liminal spaces TAs find themselves in, Cronin (2013) examined new tutors' (the UK equivalent of teaching assistant) reflections on their own learning in history based on the *Decoding the Disciplines* literature (Díaz, Middendorf, Pace, Shopkow, 2008). These tutors, in their first year of teaching, were asked to remember troublesome moments in their own learning of history in order to identify those bottlenecks within their students and anticipate how to teach through those bottlenecks. Cronin provided one example where one tutor connected a past troublesome experience to teaching students through this bottleneck; my study provides four examples of TAs in liminal spaces. Cronin identified a threshold concept for graduate students as learning to view their discipline holistically, or in the “meta-analysis” view, in Majewski’s words. Furthermore, Cronin described looking at the discipline in this holistic way as “requiring dispositional aptitudes. Here disciplinary dispositions are defined as attitudes and beliefs, about the discipline; about themselves as emerging academic teachers and about building capacity for empathy with their students as disciplinary novices” (p. 39). The process of reflection, according to Cronin, is critical in connecting disciplinary aptitudes to teaching and in the process of enculturation, “Reflecting on experiences of learning provides insights about their own encounters with disciplinary concepts and how they did – or did not – come to understand them” (McLean, 2009, as quoted in Cronin, p. 38).

These dispositional aptitudes could be seen within the actions of the TAs in their moments of uptake, translation, or conceptual framing. Half of the TAs had little to no experience as teachers and their teaching identities might not have been as fully formed as their researcher identities, especially in a large research university where research takes priority over teaching in terms of service and tenure. The Stages 1-4 (none, mentioned,

translated, framed) represented in the analysis can be seen as stages to professional development within the discipline (Meyer, 2012), fully aware of the core concepts of the discipline and capable of representing and connecting those concepts to the classroom. Furthermore, the stages of TA development within the discipline can also be seen in Figure 2, where enculturation of a teaching assistant entails learning to be in the discipline while learning to teach simultaneously.

When looking at the TAs, it is important to understand where they are coming from and how they perceive the concepts, because their belief in them – whether or not they agree, or see them as being important – matters in terms of how much they spoke to those concepts. This is where the notion of uptake comes in. Uptake is the act of selecting, defining, and representing an idea used in teaching. Anne Freadman’s idea of uptake provides further insight into this particular challenge faced by TAs in assimilating multiple components into teaching and what it means in terms of the TA identity as historians. Freadman offers the image of uptake as crossing a boundary. According to Freadman, uptake and translation “is the mediation of a boundary, not its obliteration ... uptake is the local event of crossing a boundary” (2002, p. 43).

But that boundary crossing into a discipline in both research and teaching is affected by a number of factors: prior knowledge, dispositions, and earlier experiences. Enculturation to the discipline and teaching involves crossing boundaries, adopting the disciplinary “worldview” and working through these liminal spaces to become full members of the discipline residing at the intersection of identity and knowledge. In one study, Mary Jo Reiff and Anis Bawarshi (2011) examined factors that inhibited or facilitated this movement among first year composition writers. They examined how students use prior genre

knowledge when approaching new academic writing tasks. Their findings suggest that students who perceived themselves as expert writers were less inclined to adjust their prior knowledge for the task; those who put themselves within a novice status questioned their prior knowledge and repurposed it for the task at hand. In other words, these novices were willing to put themselves in the learning role while the students who maintained “expertise” within certain writing genres clung to what they already knew.

Reiff and Bawarshi’s description of these students parallel the experience of the TAs. In their study, students who were not willing to repurpose their prior knowledge were seen as “boundary guarders;” while those students willing to extend prior knowledge to new conceptions to produce new understanding were seen as “boundary crossers.” They described confidence as one indication of whether a student will guard or cross a boundary (p. 325); related to this is the mindfulness students exhibited when faced with uncertainty. They were mindful and reflective of their own challenges when faced with more difficult writing assignments. The combination of confidence, mindfulness, and reflection can also be seen as important factors within the TA interviews when looking at their dispositions towards Majewski’s pedagogical efforts and their disciplinary worldview. Excerpts of the TA interviews highlight their own teaching experiences, their perceptions of threshold concepts, and their perspective on where they were in crossing thresholds. Boundaries existed between how they viewed the threshold concepts introduced in the course by Majewski and their capabilities for teaching those concepts. TA5 and TA4 could be seen as the boundary guarders in that they saw themselves more as disciplinarians, not willing to engage or uncertain as to how to engage in the new framework Majewski employed. TA1 and TA2, the

graduate students new to teaching, could be seen as the boundary crossers within this study.

I will discuss each TA below.

TA5.

“Still working on all of them. I’d say, you know, across the board. Uh, yeah, definitely. That’s, you know, I mean it’s nice to have them. I haven’t even really given much thought to this idea of threshold concepts.”

The above statement came from TA5, the most experienced TA in the group and one who displayed a disconnect between what he valued most in the discipline (writing, analyzing sources, and contested narratives) and how to teach those concepts to students. In Figure 2, he hovered closer to his disciplinary identity. He often placed at Stage 1 and Stage 2 in introducing concepts within his discussions. At the time, he was in his third year of the program. He had completed two years of teaching while earning a master’s degree and he had taught six quarters at UCSB prior to working as a TA in History 17B in winter 2013. At the beginning of the 2013 quarter, a different TA asked me if I was going to observe TA5 because he thought he was the most experienced TA of the nine. In the context of this study however, in the 2013 version of the course, he never went beyond minimal mentions of the concepts in his discussion sections, staying in stage 1 or 2 of not mentioning the concept or minimally mentioned something related to the concept. Even though he deemed contested narratives an important concept in his thinking, he did not reference it in the first week of his discussion. He displayed inconsistent application of any analytical primary source questions. Historical empathy served only to confuse his attempts for the discussion when he asked students to apply their present views on the past. He seemed confined by what Meyer and Land (2003) called troublesome knowledge as “ritual” or “inert.” It was possible that TA5 did not integrate the concepts because he could not connect them or integrate them into his

own understanding. Therefore, he stuck to what he knew as a boundary guarder of his prior knowledge and understanding about teaching.

This attitude could be seen when we discussed the use of the lesson plans shared at the weekly TA meetings. Each TA created one each week around the readings. He said he did not refer to them at all as he preferred to read the documents and ask his own questions. For TA5, the established way of seeing how to teach history had been honed through survival tactics (“thrown to the wolves”) instead of a comprehensive approach to the discipline or teaching.

At the same time, TA5 did express moments where he wanted to improve as a TA, showing that he did think about alternative methods to his own. He mentioned he wanted to improve his discussion sections in his 2013 interview; at another point at the beginning of the 2014 quarter (during a walk to his class), he was candid in telling me that he thought two discussion sections did not go well that day and he was thinking of what to do differently in his next section. What he did differently that day was structure his opening discussion based on the new primary source reading guide. In the TA survey I implemented at the end of the quarter he wrote, “I consciously tried to incorporate the guidelines for reading primary documents into my discussion sections this quarter. It worked well.” For this TA, it appeared that one reason he only minimally referenced the concepts in the first quarter was because he could not situate his own identity in the discipline within Majewski’s new format for the course in 2013. As Baillie, Bowden, and Meyer (2008) described liminality, this TA could be seen as being within a “state in which there are two competing ways of seeing a situation, one the established but increasingly inadequate way and the other a new, more powerful and comprehensive way of seeing” (p. 14). When TA5 remained in Stages 1 and 2 it was

because he admitted to not having thought at all about the threshold concepts. He remained a boundary guarder instead of crosser in that one statement; dismissing the potential reflection on his own teaching that the concepts could have provided him. However, he understood that his identity beyond graduate school would entail teaching and research. At one point, I asked him if he wanted to teach upon graduating where he replied an emphatic “yes.”

Where TA5 paid little attention to the threshold concepts Majewski introduced in 2013, in the latest version of the course, his third time teaching it, TA5 seemed to allow more room for the concepts to surface within his discussion sections. In 2014 he described his approach as “consciously” incorporating guidelines. When asked about the impact this had on his discussions he stated, “Using the guidelines for historical thinking helps move the discussion beyond the simple read and regurgitate. When prompted in the right way, I found the students had smart, critical things to say about the sources.” In this excerpt, the TA found that his conscious, deliberate actions enriched the discussion and improved student engagement. At the end of the study, this TA showed emergent threshold capabilities for teaching threshold concepts. In addition, he showed signs of abandoning what the “wolves” had taught him at his previous university in order to access new ways of approaching teaching. He understood that teaching would be an important component of his future. He saw his identity as being a teacher in that he described how he approached the quarter as applying the reading guide in a “conscious” way. In this manner, he used Freadman’s process of select-define-represent in order to make his uptake of the concept more transparent to students. TA5 was an example of what Land et.al. (2014) describe as “learning is as much about unlearning old misconceptions as it is about acquiring new ideas” (p. 212). This is important to consider when graduate students are training to enter academia

because the ability for this TA to show signs of change demonstrated promise for ensuring what constitutes a “quality education at UCSB” (words of the graduate dean spoken at a January 2014 talk). His identity as an experienced TA with a disposition to not reflect on threshold concepts shifted to his understanding of his role as making disciplinary knowledge transparent and consistent in his discussion sections.

TA4.

“I really don't know. Actually this is something that I've begun thinking about what is the point of a general education history course and should it be to teach people to think as historians? So it is something that I just haven't my own teaching-philosophy-type answer to yet.”

While TA5 seemed caught within a preliminal space in 2013, TA4 entered the liminal space of grappling with the conceptual difficulty of working with some of these new frameworks for teaching history – the reflective back-and-forth between wanting to do something new yet wondering how it fit within the old regime. In his interview and impromptu conversations, TA4, demonstrated a receptive disposition to new ideas during the time I observed his sections. He often teetered between stages 3 and 4 in terms of trying to translate the concepts into his section but not quite displaying a strong enough grasp on it to frame the discussion within the concept. However, his interview comment above suggested a fundamental struggle with thinking about important questions related to teaching and history. When reading TA4's interview comments made at the end of the 2013 quarter, Majewski found his question to be in line with those of experienced historians around this fundamental question about what to teach within a general education course, demonstrating where he was in the liminal space of considering threshold concepts as disciplinary knowledge and how to teach that disciplinary knowledge.

The tension between teaching content and framing the content within a disciplinary framework for students identified by TA4 (and Majewski) brings up the central issue of identity when considering how information moves through a system, especially when this confusion exists among experienced professors and a novice graduate student. TA4 described it as genuine puzzlement over his “role in this whole process” (TA4 Interview, 2013). Both TA4 and Majewski spoke to the tension between teaching content and teaching the strategies to use that content in meaningful ways – this tension promoted challenges in many ways and reinforced the idea that translation and framing capabilities are not automatic but take time to develop. However, this remained confusing for TA4 despite his own capability for blending the two, often produced through accidentally productive discussions around threshold concepts. For instance, within his attempt to translate contested narratives, he outlined a rudimentary framework of what historians do and what he would like students to do in discussions: evaluate evidence, understand an author’s perspective or motivation, establish validity of the source, and understand the context of a source (looking at omission as well as inclusion). In a different attempt at translation, TA4’s experience within the incorporating historical empathy discussion revealed the troublesome nature of the concept for him and for the students. Yet he returned to his impressive capability for keeping the focus on the actions of analyzing sources in order to steer the discussion back to the primary sources. In both instances, his identity as both a disciplinarian and teacher produced complex, rich discussions about the readings and the strategies to uncover what they were about. Translation and framing of threshold concepts often supported the “uncoverage” (Perkins, 2006) of content within his discussions.

Further complicating his confusion around his role as both disciplinarian and teacher, TA4 reflected on other historians' work about what should be taught in a history classroom. He discussed other sources that talk about what historians should be teaching to in the discipline, the Andrews/Burke (2007) piece from Dr. Cohen that identified five core concepts of history and ways to teach to them and a William Cronon (2013) piece on the role of stories in teaching history, both published by one of the governing associations of the discipline, the American Historical Association (AHA). This demonstrated some reflection on his part on the "meta-analysis" or holistic view of what teachers should do when teaching history. Despite this additional reflection on how historians teach, he repeatedly returned to his puzzlement over the purpose of a general education history course. He explained in his interview:

Even with Pat Cohen (the professor he TAd for in Fall 2012) I had been more of, 'well let's just work on writing and communication because that is the only that matters to non-majors' and then looking at [the question of] who freed the slaves and once you get into concepts like this, well it's complicated and I don't know how necessarily useful that is, nuance is always good, but I don't know if that's necessarily the best thing.

TA4 referred to the week in the 2013 course where the reading and the accompanying primary sources for the week in the course complicated the traditional narrative of Lincoln as fully supporting emancipation or being the sole person responsible for freeing slaves. However, this complication proved useful to think about for Student A who described the impact this complicated idea had on her own thinking ("I even called my mom about it," Student A, Interview, 2013).

At one point in our interview, TA4 asked me if I thought it was a good thing to "to pull back the veil on what we're doing." I threw the question back to him to consider if he thought this was what Majewski had done during the quarter. In his response to my question,

he displayed his own view on the purpose of the course, “I feel like on some level these surveys need to be content-driven because I think I really think on some level that there's a lot of remediation ... where students are not coming out [of high school] understanding the basic facts of history.” He then went on to explain that only the better students would be able to grasp the “big historical ideas” or threshold concepts as he witnessed in Cohen’s course in Fall 2012. He considered it a “juggling act and something that I am legitimately confused about and my role in this whole process.”

Where TA5 displayed little reflection on the subject of threshold concepts, TA4 demonstrated ample reflection on the tension posed in introducing historical thinking to the point where he was uncertain about his stance on the matter. This was in part due to his experiences with Patricia Cohen in the previous quarter and through his own readings about teaching from prominent historians. Throughout the 2013 quarter, TA4 demonstrated his capabilities for teaching threshold concepts despite the underlying uncertainty he felt about the purpose of it or the inability to reflect on his actions and how they connected to core disciplinary knowledge. He could do it but he was not ready to include it in his “teaching philosophy.” In the case of TA4, examples of existing practices of the application of threshold concepts framework could have helped him understand the connection between the concepts and the content, possibly. Given the type of framing Majewski introduced to the new crop of TAs in 2014, TA4 could have benefited from the additional guidance as he moved through the liminal space of teaching development and in thinking through the incorporation of the framework into discussion sections.

TAs 1 and 2: The Two Novices. Despite little teaching experience, TA1 and TA2 seemed poised to take up the concepts and integrate them into their discussions, consistently

moving within Stages 3 and 4 in translating or framing concepts for students. Both had previously taught in Patricia Cohen's course (History 17A), where she also introduced historical thinking ideas and gave the graduate students the Andrews and Burke (2007) piece to read. It is hard to determine the exact influence of Patricia Cohen's work with her TAs in Fall 2012, but it is notable that both TA1 and TA2 were new to teaching and this had been their first experience teaching history. In terms of developing an identity as a member of the discipline and a new teacher, they appeared more attuned to what threshold concepts could offer in term of student learning. Their consistent placement within uptake stages 3 and 4 reflected what is found in transfer/expertise literature where novices are more disposed to take on expert strategies (Perkins & Salomon, 2012; Reiff & Bawarshi, 2011; Carter, 1990). While the more experienced TAs displayed preliminal placement (TA5) and conceptual ambivalence around connecting concepts to the classroom (TA4), TA1 and TA2 displayed "dispositional aptitudes" (Cronin, 2013) necessary to merge their learning in the discipline and their learning to become teachers of the discipline.

TA1.

"Everything was historiography last year ... and I didn't even know what historiography was."

TA1, in her second year of the program, had entered the graduate program with an undergraduate economics degree. She described history as a "very big departure" from her undergraduate work. When we discussed Majewski's motivation for introducing historical thinking lectures as coming from the threshold concept literature, it was within this discussion about threshold concepts that she talked about her experiences in her first year of graduate school and the struggle she faced with the historical reading strategies to find arguments and write arguments. When I asked her if there was a historiography class particularly for first-year graduate students, she discussed the year-long, required, U.S.

history series she took, “They are like, ‘you are going to write this historiography paper and we’re doing history.’ and I was like, ‘what *is* that?’ [laughing] So it was a frightening first quarter and most of last year.” When I briefly explained Wineburg’s book to her and his findings around sourcing, she exclaimed, “I didn’t look at the footnotes of any book until my second quarter here [one year prior to the time of this interview]. Like you’re supposed to do that? You’re supposed to compare this to where they’re getting all this stuff from? And you’re supposed to know this already.”

In chapter four, I described Majewski’s reactions to this TA’s comments. He explained she should have been in a position to make connections within her required course as the implicit historical strategies were there. Yet for someone totally new to the discipline, these connections proved challenging and time-consuming. If she had learned this strategy of sourcing in her first quarter, would that have contributed to her ability to recognize and to situate arguments? Possibly. Again, TAs, in the liminal space of their identities between student and teacher, could have also benefited from an explicit emphasis on historical thinking in their own work. Her dispositional aptitude, however, and her willingness to take risks in the classroom positioned her identity as an adventurous, emerging instructor. In 2013, she was the only TA I observed who analyzed the Andrew Jackson veto letter in her first meeting with students because Majewski had suggested it. In 2014, only she and TA8 had students analyze the veto letter in the first meeting while the other TAs held 10-minute introductions (with the exception of TA5). The affective aspect of her aptitude (reflective and risk-taking) and her apparent threshold capabilities (translation and framing) proved a unique combination of abilities due to her inexperience in the discipline. When discussing why she framed her historical empathy discussion as she did (engaged students in thoughtful

exercise at beginning of class), TA1 coupled reflection on how she viewed her discipline with helping students do the same, “I think I was just moved by his historical empathy thing and it caused me to also re-evaluate how I'm going to look at people in the past so this moving to the future world and looking back at us was ... seemed like the logical thing to do and try.” For TA1, the strategy to select the importance of this concept, elect to use it, and represent the professor’s concept to her classroom seemed logical. In this example, the ability to make this connection and frame her class accordingly displayed the foundation for intentional practices that she will continue to employ in her career. In the 2014 TA survey, I asked a question as to how they incorporate historical thinking in their own teaching. She responded:

I have returned most to ideas around historical thinking, really trying to get students to think in the time of the historical actors we're learning about and not be too presentist. I also did a paired thesis workshop, referring back to Professor Majewski's example in class of ways to strengthen a thesis statement.

In the excerpt above, she explained how she has maintained a focus on the historical thinking ideas and prevented students from applying presentist views (in the three discussion sections I observed in 2014, she often said, “at that time” or “in *your* eyes, but what about the author? Where is this person coming from?”). In addition, she aligned her thesis statement “workshop” to Majewski’s explanation of strong theses in class. TA1 demonstrated the affordances the focus on threshold concepts from Majewski had on someone with little experience. Her identity as a novice graduate student and teacher, exposed to the practice of thinking about what students should get out of the discipline and how to teach it, presents an ideal scenario to enable TAs to cross boundaries within the discipline and teaching.

TA2.

“That’s good to think, to actually, because I don’t necessarily reflect back on them [discussions] all that often so that gives me an opportunity to think about it.”

“I would still do it. But I think [Majewski] did a better job than I did so maybe I would try to be more creative.”

As novice graduate students and teachers, TA2 and TA1 were very similar regarding their dispositions toward the discipline. TA2 differed slightly in the degree to which he reflected on his own teaching through our interview in 2013. The first statement came after I described what I saw within his discussion of writing thesis statements where he combined the process of analyzing primary source strategies for the purpose of strengthening the thesis statements. He said he did not reflect on what he had done in class and the interview provided him the opportunity to do so.

The second statement referred to our discussion of why he discussed the difference between primary and secondary sources on the first day of class with students when it had little bearing on what they actually did in class. He acknowledged Majewski’s lecture and it prompted him to consider how he could alter his approach at the same time. In Majewski’s model for analyzing primary sources, he recognized particular strategies he would be willing to take up in future courses. Because Majewski tried something new within History 17B, TA2 held the disposition that he should also generate new approaches to teaching. For instance, during the interview discussion on why he discussed the difference between primary and secondary sources, he explained that he tried something different in the new course he was teaching at the time of the interview. Instead of a discussion on primary sources, he wanted to understand students’ prior knowledge on the 20th century (History 17C) so together, so they developed an initial timeline. I asked him if he would return to this

initial outline at the end of the course, he said he planned to show them the timeline later so that they could add to it based on what they had learned in class. When I asked him where this idea came from, he mentioned the time constraint of his first discussion section limited him to having a brief discussion about the overview of the course. He felt this was a simple way “to know what they knew.” This demonstrates his ability to adapt his teaching within given constraints on time.

Another moment of this TA’s awareness as a disciplinarian and a teacher came through our discussion of the purpose of the primary and secondary sources discussion. TA2, when discussing analyzing primary sources, was the only TA to discuss how that discussion, that he deemed “important to us,” was important to the discipline. Through his time in the department, he picked up the idea that this was a discussion TAs had in their own classes. Therefore, he mentioned it in the opening TA meeting as something they should do on the first day of class. He explained in his interview why it was important, “So, I think it's important to us, we decide that it is important to know that they [sources] are to be read differently. It is all about trying to introduce the idea that you read different things differently.” Through this discussion he showed his identity in both determining what is important for students to know about disciplinary knowledge and his identity in teaching in selecting what should be taught.

In addition to his disposition towards taking pedagogical risks, TA2 adopted the threshold concept terminology readily during the interview. In discussing which concepts he hoped students would understand, he discussed them as “threshold concepts” and described them as tools to make “life easier” within the discipline. “I hope they realize is that the threshold concepts, once you got them, it's about giving you tools to make your life easier in

an undergraduate history class for the most part.” He specifically mentioned contested narratives and recognizing arguments as particular areas that once you get used to them, it became easier to know what to do within a history course. This answers the rhetorical question posed in TA1’s case as to what would have her first-year experience been like if she had known about core disciplinary historical thinking strategies earlier in her first year.

Furthermore, he contributed his own idea to what a threshold concept in the discipline might be and it was an issue he was clearly grappling with at the time of the interview. After our discussion of threshold concept lectures, I asked TA2 if there were any concepts he would add to the list. He added a “more advanced” concept centered on the ability to represent history through different methods.

I agree with the list as is [Majewski’s seven historical thinking lectures]. The one thing that I had that I think is a really important concept and I don’t know how exactly to articulate it but it would have to do with method. Different historians would argue a lot with how we are supposed to be using method, but I think there is something there in terms of a threshold concept about something having to do with the correlation between methodology and narrative and the way that methods both in terms of research and theory ... both of these types of methods are embedded and interrelated actually with the arguments or discussion you are having with other historians.

I asked TA2 to clarify what he meant by “method:”

So it has two parts: the first part is how you define your sources so you pick your sources and what you do with them and that is a straightforward one. Just research method and this includes things like do you count things, do you do textual analysis, data mining, all these sorts of things but the other part of it I think is that there are methods for writing. We focused in 17B on narrative quite a bit, but that is not the only method in history and there are certainly methods within that and I think it is really important to understand the way that works.

Bounded within this one idea, TA2 described the corroboration aspect of historical knowledge where historians engage in arguments with each other through writing. Within the idea is contained the disciplinary knowledge required of graduate students to understand

the sourcing of an argument and how to contextualize it within previous historical writing. He contended that not only should graduate students understand the argument but also the method in which that argument was constructed. TA2 classified this formative concept as “advanced” possibly something for graduate students to consider. In fact, many universities require such a course for first-year graduate students to take, usually called historiography or the ways in which historians read and write. TA2 mentioned that there was a methods course in the program, however, it was not required and the focus of the course depended on the particular view of the person teaching it. At the time, the methods course focused on reading famous historians going back to Herodotus. Regardless of the existence of this course, TA2 defined a very complex concept that he himself grappled with in his own research.

While TA1 demonstrated a willingness to take risks, TA2 did as well yet he patterned his risks after Majewski. He positioned himself in the role of learner willing to mimic the professor while thinking of other ways to improve at the same time. TA2 also framed the analysis of sources thoroughly in his discussions, specifically in his ability to connect the analysis of sources to the action of writing a clear, organized thesis statement. Two ideas related to the novice TAs can be seen in their dispositions to take on new challenges within teaching: adaptive expertise (Bransford, 2001) and novices being better situated to apply expert practices (Reiff & Bawarshi, 2011; Sommers and Saltz, 2009). Taken together, these two TAs displayed boundary-crossing capabilities to apply new knowledge to new situations in a flexible, adaptive manner.

Within the identities of these TAs, we can trace the direction of movement in TAs’ enculturation into the discipline. As seen in Figure 2, each TA represented a particular place within the liminal space towards becoming a full member of the discipline. TA5 found

himself identifying with his role as a disciplinarian more than a teacher in 2013. He dismissed the idea of threshold concepts within his interview given his ample teaching. In the 2014 course, he demonstrated a willingness to use the framework to structure discussions due to either the resources available or the extensive framing Makewski provided in the weeks leading up to the first discussion section. TA5 found himself within a pre-liminal stage where prior knowledge and concepts interfere with the new concepts in the course. TA4, struggled with the question of teaching disciplinary knowledge over content. His display of confusion, both in his role in the course and his confusion over seeing what he was able to do in the class, placed him in a liminal stage where he was working through this confusion in potentially productive ways – through reflection and outside reading. Additional guidance or coaching could have helped this particular TA in seeing ways to strike a balance and situate himself comfortably between being a disciplinarian and teacher.

TA1 and TA2 took pedagogical risks that paid off in terms of their capabilities to translate and frame threshold concepts, showing their ability to connect what they found important in the discipline and connect that to students. They also appeared more attuned to students in general in terms of thinking about what would be helpful or logical for them to know. TA2 asked students about their prior knowledge in two instances, extending Cronin's (2013) contention that being in a novice position allows teachers the ability to empathize with fellow novices to the discipline. Through the TA interviews, evidence of the interplay of identity and knowledge displayed their own emergent understanding of their discipline.

TA meetings as locus of enculturation into discipline and developing threshold capabilities

The situated learning literature demonstrates the need to connect characteristics of expertise with authentic contexts in which to enact and practice these qualities of expertise. Lave (1988) argued the idea of *telos* implies that learning is a continual, participatory practice developed in relation to others or in part as a result of explicitly discussing one's practice with others. The TA role proved to be critical in the movement of threshold concepts in the system. The TA meetings were meant to be places where the professor and TA discussed upcoming lesson plans and readings. It was a crucial juncture for graduate students both in reflecting on the work they do as historians and the work they do as teachers. In some ways, it became a smaller community of practice for experienced TAs, like TA5, to rethink his practices according to Majewski's perspectives while allowing for newer TAs, like TA1 and TA2, to learn from experienced people in the group.

The professor's intent in this study was to enculturate 17B undergraduate students into the history discipline. What he could not have anticipated was the enculturation of the graduate students as well. Lave and Wenger (1991) argue that situated, apprenticeship-like environments contribute to learning in meaningful ways – in the transformative possibilities of being and becoming complex full cultural-historical participants in the world” (p. 32). Viewing the weekly TA meeting as a location of enculturation also requires attention to the type of apprenticeship that occurs within that location.

In the TA interviews and in the 2014 survey, each graduate student discussed what they valued about the support they received around teaching from the professor and the department. Upon hearing his perspective on the material and in some cases, when he suggested an actual action to implement in class, they did it. This action of mimicry of emergent instructors could be seen as part of the liminal space graduate students found

themselves in between understanding the content and understanding how to teach that content. One simple example was in the 2014 course where 7 of the 9 graduate students (who filled out my survey) said they used the new reading guide in their discussion sections.

One significant example involved the issue around the discussion of the difference of primary and secondary sources that was so prominent in the 2013 version of the course. In Winter 2013 orientation meeting, Majewski asked them how they conducted their first day of section. All TAs, across the board, mentioned that they like to do a discussion on the differences between primary and secondary sources. Majewski agreed it was important therefore all the TAs I observed conducted this brief discussion in their first meeting with students. At the end of the quarter, Professor Majewski himself defended why this is important to do within the context of this course. The degree of importance attributed to this primary/secondary distinction was noted as important yet it did not align (in terms of timing or content) with the historical thinking lecture on analyzing primary sources in lecture. Prior to Winter 2014, I discussed this issue with Majewski despite the level of importance of this distinction. If the discussion of the difference between sources occurred again, I encouraged him to align his analyzing primary sources lecture with whatever the TAs might have done in class. In Winter 2014, only one TA (of five) I observed held this discussion of primary/secondary sources. One of the reasons why was it was not more widely used was that it was not discussed in the TA meeting. Instead, Majewski discussed the new primary source reading guide and he emphasized the role of primary sources in the course.

This showed the enormous amount of influence that can be shared within a 30 minute meeting with TAs. In the second year, the type of discussion that Majewski fostered yielded more thought going into the discussion sections within those first two weeks of the quarter.

Whereas in the first year of this study, the TAs used lesson plans and practices based on what had been passed down from other graduate students in the department, regardless of course context or particular readings. The minimal, direct guidance wielded in the TA meetings showed that this is an area rich with potential to apprentice TAs in thinking about teaching and learning. This increased the likelihood of TAs showing threshold capabilities in translating and framing historical thinking concepts.

Threshold Capabilities

Data from the 2013 and 2014 courses showed the practices entailed in teaching core disciplinary concepts to students. The discussion of the TAs' work with the threshold concepts in History 17b described in chapter four showed how translation and framing of these concepts represented the threshold capabilities needed on the part of the teachers (both the professor and TAs) to support the movement of concepts from professor to students. I am adapting the term "threshold capabilities" to describe the strategies under development in the TAs' understanding of threshold concepts and their attempts to teach them. Baillie, Bowden, and Meyer (2008) defined "threshold capabilities," as the "capabilities shown to facilitate the crossing of a threshold into professional learning" (p. 14). Their definition was within the context of student learning; learners also need to possess knowledge capabilities to adopt threshold concepts. In the context of this study, the graduate students needed knowledge capabilities *around teaching* in order to foster the capabilities in students. These capabilities, as Baillie, Bowden, and Meyer stated, "are thresholds to professional learning in a defined area of knowledge. In combination, the development of a range of threshold capabilities will contribute to the development of overall knowledge capability" (p. 9). In this case, the development of threshold capabilities among TAs contributed to the

development of knowledge about the discipline and teaching practice. In theory, the development of TA threshold capabilities for teaching concepts should support the threshold capabilities of students to learn threshold concepts. Again, the professor made an implicit assumption that TAs would incorporate the historical thinking lectures into the discussion sections. However, TAs' abilities to translate historical thinking strategies in the classroom depended on two aspects. First, their capabilities depended on their prior knowledge and teaching experience and the degree to which they could adapt the new material with the content. Second, their capabilities depended on taking what they heard in the large lecture (or in the weekly TA meetings) and translate the concepts within their discussion sections. The classroom observations provided a window into the space where theory met practice; the TA interviews provided a window into the TAs' emergent understanding of what the professor was trying to do and the extent to which they could integrate that into their teaching.

Within these classroom observations, the 2013 TAs showed their own threshold capabilities – the teaching capacity needed to teach threshold concepts to students. In order to teach students to develop an understanding related to a threshold concept, certain pedagogical strategies need to be in place in order to support that development. Going back to Freadman's (2002) notion of uptake, careers of the concepts were only advanced to students when TAs chose to translate and frame the concepts for students

As seen in Figure 1, the degree to which TAs took up the concepts within the stages connected the degree to which they found the concepts relevant to their own approach to the discipline. In 2013, the unintentional practices that occurred around particular concepts (historical empathy, thesis statements) informed the professor of what is possible to do with

the concepts. He then took these practices, codified them as examples, and used them when discussing threshold concepts in discussion sections in the 2014 TA meetings. In his January 2014 interview, he stated that he understood his role in the course as a teacher of the TAs as well – a rediscovered perspective he held based on the results of the 2013 course. If Majewski wanted threshold concepts to travel through his course, he needed to pay attention to the threshold capabilities of TAs in order to teach those concepts.

Based on the interviews with teaching assistants and the professor, looking to the TA meeting as a location for developing threshold capabilities could facilitate the careers of threshold concepts within a course and it could provide professional development for the graduate students simultaneously. In his 2013 interview, Majewski stated:

I do think it is interesting when I think about changing the course. My initial inclination is lecture, then assignments, then sections. Well, in some ways it should be the sections that are the most important part of the course so this is really interesting to me to be reminded of how important that is and that link is critical.

Because of Majewski's careful reflection over the events of his 2013 course, he took significant steps to frame the threshold concepts in a way that TAs understood in the 2014 course. When asked how the department supports graduate students in learning how to teach, one TA in the Winter 2014 TA survey wrote:

I also think that Professor Majewski should come to the department TA training in the fall to go over his work on historical thinking with all first-time TAs. Having his guidance has really helped me this quarter, and I think it would really benefit new TAs too.

In the excerpt above, TA8 gave her impression of how the department should support graduate students in learning how to teach. Majewski's inclusion of threshold concepts into a large course could provide a UCSB-specific approach to historical instruction.

Evolution of Threshold Concepts and Teaching in a Large Course

Over time, Majewski clarified the threshold concepts he wanted to embed in his course and the methods for embedding them. Evidence of how he articulated threshold concepts over three years demonstrated his evolution in his thinking on the concepts. He became clear in how he wanted to articulate these concepts for students, but what became apparent in this research was the need to make these concepts explicit for TAs. As seen in reflective statement from an interview in 2013, he realized the TAs were the bridge between his conception of the course and the students. In 2014, during an interview, discussion around TA practices reminded him that he needed to be aware of his role as teaching the TAs. These reminders of his identity as the teacher of teachers who are teaching disciplinary knowledge contributed to the progression of his own teaching in this course. Within these minor comments, one can see how managing a large learning system such as 17B contains many variables that warrant considerable attention. This section will discuss the evolution for embedding threshold concepts in History 17B and the steps Majewski took to support students and TAs in learning threshold concepts.

In the second iteration of the course in this study, Majewski encapsulated his thinking within the *Five Keys to Historical Thinking* document as the governing concepts of the course. In addition to crystallizing his thinking within a shareable document, he also improved in framing the threshold concepts for the TAs in order to strengthen their threshold capabilities for incorporating the concepts in the sections. During our final interview, I brought excerpts from the focus group and the 2013 interview for Majewski to reflect on his own evolution and to find out more about how the *Five Keys* document came into being.

One of the consistent elements in his list of threshold concepts across the years was the notion of the present informing the past as seen in Table 15.

Table 15. Majewski’s Evolution of Threshold concepts in History		
Focus Group 2011	September 2012	December 2013
Understanding the complex relationship between the past and the present . How the present shapes your understanding of the past and the past shapes our understanding of the present and that kind of complex back-and-forth.	Complex relationship between present and past: This concept alluded to presentism which he defined as the “Goldilocks” approach to viewing the past through the lens of the present; the importance of understanding this concept is attached to establishing context.	The meaning of any given historical narrative is often tied to the present . Historians, though, are always fearful of importing the present into the past. Historians must practice intellectual empathy —the ability to put yourself in somebody else’s shoes—but still maintain the ability to judge historical actors.

In the 2011 focus group, he discussed the relationship between the present and the past as a movement the historian makes of going “back-and-forth” to explain how the two interrelate. In 2012, he situated this concept as a way to combat presentism or the view of the past through present day norms and values. In addition, he connected the concept to a core historical strategy of establishing context among primary sources. In 2013, in the *Five Keys* document, he described the concept through what historians do and in how they consider certain narratives meaningful (their meaning changes depending on the relevant historical questions at the time) yet they are “fearful of importing the present into the past.” This new configuration of the concept brought together Majewski’s past definition of meaningful narratives (not present in the *Five Keys* document) and presentism.

I asked Majewski why this particular concept remained consistently crucial to the discipline in his own thinking. Majewski replied:

It's paradoxical, right. This is a paradox. And paradox is great. And threshold concepts are meant to be paradoxes or else they would rise to the realm of common sense. There's no threshold to go through. It's paradoxical that we give meaning to history and the present gives meaning to history, but at the same time we don't want the present to dictate the past.

But yet we strive ... and find joy when the past is really different. That's part of the appeal of the past, it is alien, it's different, it's something that's weird for us to understand, and that there is an intellectual puzzle of trying to understand this weird and alien place.

In the excerpt above, Majewski used one of the threshold concept attributes to describe the complexity of this concept in that it is inherently troublesome and once crossed, it will help students understand history. His second statement spoke more to the idea of what history is about overall and how a historian's role is to understand the context at the time and solve an intellectual puzzle. Looking to history as a puzzle that poses challenges to students seemed like a fruitful description of the discipline yet how this concept played into the solving of that puzzle still was not clear. So I asked him how this concept was important for students:

I've been more struck over time at that paradox and how important it is, how central it is and how confusing to novice practitioners and it is not an easy thing to get and when exactly do you reach that level where you're presentist versus where you're just finding meaning in the past for the present? I do think that is really important to teach students about history; something that not all students will get; but it will be the classic threshold concept where they will get elements of it this quarter, but the hope is if they go on, it will become clear over time.

In the excerpt above, Majewski explained how examining the past without a presentist lens was a difficult concept for novices to understand about history. He understood that this concept would not be understood fully within one quarter but it would be a concept that would help students progress in the discipline. This complex concept proved confusing to

one TA who wrote in the 2014 TA survey that she did not know how to translate this particular “key” for students as, “this one is a little bit hard to articulate and incorporate into discussions of primary sources.” To connect his statement about students to the challenges of the TAs, I mentioned a scene from one of the discussion sections I observed that day:

Me: I think this concept is a challenge for students and TAs in how to manage the discussion. For instance I saw a moment where a student brought an emotional stance towards a document and it was challenging for the TA to take that emotion and turn that into a constructive discussion. The TA wanted to build on the student’s enthusiasm and but at the same time emphasize that they have to think about the audience “at the time.”

Majewski replied that this demonstrated historical empathy and he told me how he would have reacted to the student if he were the TA:

That goes to historical empathy, and so my initial reaction to that if I were the TA I would ask the students, ‘I totally understand your point, but why would women in 19th century find domestic ideology appealing, what’s in it for them? why is it appealing and persuasive, not just a male ideology and a lot of women are propagating it too.’ And just kind of encourage the student to take that leap from ‘how I am in the 21st century’ but having the empathy to understand.

This is helpful for me because it shows how the empathy concept is related to this kind of tension [between] the present and the past you have to understand how the people in the past believed it.

This interview exchange showed the complexity Majewski brought to the process of clarifying important concepts but also the complexity to explain them in a way that students and graduate students could understand. Despite having the *Five Keys* document, he did not explain the points in depth with the TAs or students. It served as a reference and an overarching framework for the course. Yet his statement about what I observed in the class discussion connected to empathy in his own understanding. This showed that the overarching concept might be hovering in an obtuse way over the course, but the actionable, strategic concept to teach to students was historical empathy. Majewski mentioned that all

the concepts in his *Five Keys* document were intrinsically linked, but the threshold concept outlined the overarching level and the act of empathy lies at the actionable level.

This speaks to the relationship between threshold concepts and historical thinking and Majewski's blending of the two ideas throughout this study. This is how Majewski differentiated between the two:

Threshold concepts [are] great especially when I'm talking to different audiences from different disciplines, every discipline has these threshold concepts, but you can define threshold concepts as a way of thinking about the world. It makes sense for me to put it in concrete terms and this literalness, this is how historians think, is both true and helpful. In a way a discipline is just a group of people and threshold concepts is describing how this group of people thinks.

In the excerpt above, Majewski identified threshold concepts at the disciplinary level, the disciplinary knowledge that pertains to each discipline. How people think in this discipline constituted the historical thinking strategies contained in his lectures: how historians think, analyzing primary sources, using historical empathy, and crafting thesis statements. This differentiation was seen in describing the complex concept of the relationship between the present and the past yet the action of empathizing with historical actors makes that concept actionable on the student level. Yet when I asked if there was a direct correlation between each of the *Keys* and the four historical thinking lectures he planned to do (introduction, analyzing sources, historical empathy, and thesis statements), he stated that his process would be to bring up the *Five Keys* at relevant places in the lectures so as to make the integration of threshold concepts more seamless. His interpretation of embedding threshold concepts into the course consisted of making them less explicit in terms of discrete lectures that preceded a content lecture, but making the terminology explicit at various points in the lecture.

One example of this occurred during his second historical thinking lecture in week two. At one moment, when discussing the purpose of looking at the ancient Roman text, he explained that prior knowledge came into play when looking at an unknown text. This showed how it was “important because it shows why the present and the past is always connected ... [when reading a document] always bringing a bit of yourself or a bit of the present when reading a document.” However, he did not explicitly reference the *Five Keys* document (Appendix I) nor did he direct students to the primary source reading guide (Appendix J) which directly connected to the strategies he defined in this exact lecture. These were minor instances of reinforcement that I expected Majewski to make given his newer emphasis on bringing up these important points during the lectures. However, this demonstrated the challenge of making disciplinary knowledge explicit and connecting it to the resources set in place to support the learning of this knowledge.

In his two quarters of using threshold concepts, Majewski demonstrated how threshold concepts represented an overall framework for his approach to the course and historical thinking became the particular actions he wanted students to employ. In 2013, the threshold concept framework resided within the seven historical thinking lectures; however, the particular actions required to teach to those concepts fell to the TAs to manipulate in their discussion sections. The practices demonstrated by the TAs informed the professor of what was possible and replicable at the discussion section level. In his current form of thinking about the concepts (2014), he developed the *Five Keys of Historical Thinking* to represent the larger historical principles that governed his course. He reduced the number of historical thinking lectures that specifically related to the actions to support the larger principles of the

course. When asked how they connect to each other, Majewski described them as relevant points that illustrated the larger concepts.

Threshold concepts spurred Majewski on a trajectory to redesign his course to connect students to core disciplinary concepts. Tracing the careers of these concepts yielded more information about what is needed within the system in terms of the types of processes that need to be in place to support the inclusion of the concepts in the course. The lens of looking at a course as a large system allowed me to articulate these distinctions in terms of what the effects of introducing threshold concepts in a course are. What I have learned is that threshold concepts afford teachers an opportunity to rethink the goals and principles that drive their course. Translation and framing of these concepts represented the threshold capabilities needed on the part of the teachers (both the professor and TAs) to support the movement of concepts from professor to students. The historical thinking strategies, such as analyzing primary sources, represented the particular threshold actions needed to support students in moving through thresholds to the discipline.

Conclusion

Many current conversations within higher education make the findings in this study relevant and timely. The potential for situating threshold concepts in history in a large lecture course benefits students; but it could also situate epistemology enculturation for the teaching assistants. Two discussions of reforms within history graduate education occurred within the last year, both stemming from the American Historical Association (AHA): one in reaction to the threat of online education and the other in reaction to the lack of employment available to history graduate students. AHA developed a task force to examine graduate student training. The threat of the new form of online education known as MOOCs (massive open online courses) prompted AHA to react by calling for the need to better prepare graduate students so that students would not opt for online courses. An article appeared in *Inside Higher Education* in January 2013 addressing the discussions at the annual meeting of the AHA. MOOCs represented a perceived risk of taking students out of the traditional classroom in exchange for a more affordable online education. Richard Bond, history professor at Virginia Wesleyan University, described the response history departments should apply to the threat of MOOCs

Better-preparing graduate students to teach history could help bridge an emerging cultural “schism” between research and adjunct faculty and help history departments better defend themselves against the enrollment-draining potential of the massive open online courses. Such changes also must be paired with a radical undergraduate curriculum reform that challenges traditional, content-pure perceptions of the major (paragraph 3).

In March 2014, the AHA made news with a new initiative called “No More Plan B” funded by the Mellon foundation to incorporate alternative courses geared towards expanding the skills of history graduate students. One of the schools involved, Columbia University, will

offer a course specifically related to teaching, “students in the course would have to develop a project with a local historical focus and explore the problems of translating historical content into appropriate grade-level instruction” (Jaschik, 2014, paragraph 3). Pairing better teaching assistant training for epistemological knowledge *and* for teaching with undergraduate reform complement my findings on the teaching assistants in this study.

Large-scale courses show no sign of disappearing anytime soon, especially when large-scale online course endeavors function in the same way as their analog version. The initial intention of the professor aimed to make course concepts explicit to students; while that may have happened, the benefits of this type of inclusion connected to the everyday work of a TA in a meaningful way. This new approach to history survey courses, and the means to delineate the stages of uptake in teaching concepts, provided a space for the TAs to consider what it means to be a member of a discipline and teach within that discipline. When TAs took the time to reflect on these disciplinary considerations, positive strides towards good teaching connected to student learning. Similarly, when the professor took the time to frame the conversation around threshold concepts for the TAs (as seen in 2014) the TAs had more time to consider ways to incorporate the first two threshold concepts within their discussion sections. Cultivating the TA role, within this large university setting, provides the bridge between the disciplinary concepts, the curriculum of the course, and the students.

Majewski established a curriculum that combined an emphasis on the core cognitive strategies, the threshold concepts, needed to make sense of content in his course. Lauren Resnick (2010) would describe this type of course as one exhibiting a “thinking curriculum,” a curriculum that connects all the 20th century research on cognitive learning to classroom practices, classrooms that are “high in cognitive demand (conceptual learning, reasoning,

explaining, and problem-solving are exchanged daily) ... [where] thinking abilities have to develop in the course of reasoning about specific information and knowledge” (p. 187).

Resnick views the scaling of thinking curricula within larger settings as a problem. While her concern in the article centers on the type of systems needed to scale thinking curricula within large, k12 school districts, this large-scale thinking parallels the issues at hand in History 17B and the curriculum system of UCSB and other institutions that offer large lecture courses. According to Resnick, she categorizes scaling the thinking curriculum as an “organizational design problem”— a problem that warrants a system that entails people to learn how to teach differently to support student learning and the infrastructure and policies needed to support that system. She looked to system engineering practices to consider what it would take to re-engineer educational organizations. She found that total quality management systems focus on processes and the policies in place to foster productive processes for people within a system.

The systems she examined were “nested” or layered levels of production. She overlaid this nested system on to a conceptual model for a k12 district to look at the components needed at each level to support teachers in “producing” student learning. At each level, three components were necessary to ensure that the processes in place would produce student learning: human capital (“teacher knowledge and skills; instructional leadership,” p. 190); social capital (“ways in which people in an organization share what they know,” p. 191); and instructional tools and resources (curricula, lesson plans, reading guides). These components of an instructional system are what Resnick calls the “triangle to guide policy design in educational settings” (p. 190).

While this study did not apply thinking curricula throughout the whole history department or the university, Majewski established a thinking curriculum within a large course, providing a glimpse into what could enable the scaling of threshold concepts to hundreds of students. Applying the triangular formula of human, social, and resource capital to a large lecture history course takes into consideration the processes of the people involved, the ways people share their practices, and the resources that support these processes. Work completed by Majewski and his TAs provided an initial model for thinking about scaling a thinking curriculum in a large course. Their model provides a lens on further implications for this work. As seen in Brown and Duguid (2000), understanding the practices that occur within a system is the first place to consider the type of reform needed to scale thinking curricula within an organization, particularly one like History 17B.

Implications for resources and human and social capital in a thinking curriculum

Resources. In order to facilitate uptake of threshold concepts, Majewski, in 2014, focused his efforts on framing the use of threshold concepts just as TAs framed the concepts in key moments in 2013. He also created resources that supported his own articulation of his evolving set of concepts and he shared these resources with TAs in the meetings leading up to the start of the quarter. Majewski used these documents to anchor his discussions with TAs: the TA guide (Appendix H), the *Five Keys* document (Appendix I), and the new primary resource guide (Appendix J) that I developed. Each document connected to the threshold concepts of the course as defined by Majewski creating a network of supporting resources for the network of concepts provided for students in the course.

Another area where common resources could be developed to leverage the dissemination of concepts would be in essay prompt creation. Essay prompts were the

assignments where students combined their knowledge of the readings in class with historical writing. In 2014, Majewski developed new essay prompts where he situated the questions within real-world scenarios. For example, one of the new essay prompts read:

At a family dinner, your beloved Uncle Sid proclaimed “The Civil War was all about economics and money.” Your beloved Aunt Nancy argued that was nonsense. “It was the abolitionists who had the most to do with instigating the Civil War,” she argued. Who has the better argument, Uncle Sid or Aunt Nancy? Was the Civil War mostly about economic issues such as free labor ideology and the spread of slavery in the West, or was the morality of slavery an equally important issue?

Whereas, in the 2013 essay prompt asking students to consider the causes of the Civil War, referenced a secondary source’s argument:

Marc Egnal argues that “antislavery remained a secondary concern and economics was primary in the formation of a strong northern party [The Republican Party] in the 1850s.” Analyze the documents on slavery and sectional division to evaluate Egnal’s argument. Was the “Cycle of Distrust” primarily about economic issues? Did anti-southern writers such as Seward and Helper draw a sharp distinction between the moral condemnation of slavery and an economic critique of slavery?

While the new prompt appeared informal in tone, the question took on the tone of one of Majewski’s earliest conceptions of a threshold concept where he wanted students to understand that history is all around us. The tone of the prompt suggested that Majewski wanted to students to take the primary sources and situate their meaning within a dinner table conversation.

Further development of such assignments and asking TAs to provide feedback on such prompts (during one of the 2014 TA meetings) brought the TAs into the conversation of asking students to demonstrate evidence of learning. Developing further assignments together, the professor and the TAs, could build a repository of assignments related to the development of threshold concepts. Additionally, it could enculturate TAs further into

conversations around course design related to designing meaningful assessments to determine if students are reaching the intended learning goals of the course.

Professor's role. Professor Majewski made huge strides in making historical thinking explicit within a large lecture course. His efforts, beginning in 2011, launched his process for reflecting and thinking about the “meta-analysis” of the discipline and what it could offer students and teaching assistants. Despite this trajectory, the difficulty of sustaining this explicit emphasis in his course showed in our last interview. In the 2014 version of the course, Majewski developed the *Five Keys* document as an overarching guide to historical thinking. He delivered the same four historical thinking lectures. Yet within the lectures, he did not make the connections between what he was talking about and the resources he already provided for students. This does not show a shortcoming on Majewski's part; it highlights the difficulty to maintain those explicit connections for students as the course progressed.

When it came to working with the TAs, Majewski modeled and suggested ways to incorporate historical thinking in discussion sections during the initial TA meetings in 2014. He asked graduate students to refer back to the *Five Keys* document in their own discussions and through their lesson plans. Again, maintaining this level of modeling for TAs required additional focus and attention yet it holds the potential for further alignment between the overarching principles, the threshold capabilities of the TAs, and the specific actions required in discussions and assignments. Biggs and Tang (2007) suggest the concept of “constructive alignment” between intended learning outcomes, assessment, and teaching activities. This notion of alignment and revealing the process of creating alignment (e.g. course design) adds

further potential to model course construction for TAs in the lesson plans they produce, as one example.

During our January 2014 interview, at the end of our conversation, Majewski stated that he needed to be reminded that he was teaching the TAs as well. We had been discussing some of my observations (within an anonymous manner) of discussions I had observed that week. I explained the choice one TA made to not analyze the Andrew Jackson veto letter in the first discussion meeting to which Majewski replied that he did not agree with that TA's choice. While he recognized that it was his responsibility to teach the TAs as well or enculturate them into the discipline and teaching, it was impossible in his view to monitor the teaching activities of nine TAs. This showed the difficult, complex process for the professor to make knowledge explicit within the TA level of the "thinking curriculum" in the nested learning system.

TAs and their weekly meeting. While it might have been disconcerting to hear that a TA made a decision counter to what the professor preferred, it seemed helpful for the professor to hear what the TAs were doing. In order to bridge and reinforce the communication chain within a nested learning system, one implication for a thinking curriculum to work would be to turn the TA meetings into a practicum-type model where graduate students engage in the process of reflecting on their own teaching. All 7 (out of the nine 2014 cohort of TAs) wrote about the TA weekly meeting place as an example of a departmental practice in place to support graduate students in learning to teach. The TAs used their meeting time with Majewski to gain insight into his thinking about the readings and suggestions for discussions.

Another benefit to strengthening the purpose of the TA meeting would be to address any areas of confusion on the part of the TA. In the case of TA4, who sat on the cusp of stages 3 and 4 and who, in his interview, went back-and-forth as to his puzzlement over the whole “disciplinary enterprise” of this course. TA4 stated that a survey course should only teach content, yet his classroom practices showed that he possessed the capabilities to infuse content with threshold concepts within his discussions. In Figure 2, TA4 was clearly moving towards expertise in reflecting on the challenges of teaching content through threshold concepts. In order to bring TAs closer to the intersection of the discipline and its knowledge and teaching and teaching capabilities, the weekly TA meeting will be the place to foster Lave’s notion of an “embodied exemplar,” or someone who understands and has reflected on how their identity, in this case their identity as teachers, developed through continual practice (Lave, 1996).

Getting TAs to reflect on disciplinary concepts early and often within one’s graduate career sets the groundwork for their own progression in disciplinary knowledge and in teaching knowledge. Coupled with the practicum model for the TA meeting, the development a portfolio would be beneficial for them to develop their teaching philosophy. Within the LMS Gauchospace system, there could exist a discussion forum solely for TAs and the professor where each TA could post a weekly reflection on one discussion section outlining a positive moment in a discussion and one challenging moment. The rationale for this type of reflection post would be to create a catalogue of practices for the TA to remember from quarter to quarter (e.g. when TA2 said in his interview he never reflected on what he had done in class). Expression of the challenging discussion moments in the reflection post could provide the professor a window into the concerns and questions faced

by students or TAs. For someone like Majewski who wears two hats within the university-- as a professor and dean-- this type of management could seem daunting. The benefit, on the other hand, could yield tremendous value in being able to respond to questions as the course progresses or provide moments where he could write, "If I were in your shoes, I would have done x,y,z" While this was helpful for me to hear during my interviews with Majewski, the TAs would benefit from that type of guidance even more.

Further research could include application of the stages of uptake in graduate student development or within professional development. The stages of uptake provided a lens on concept development as it related to teaching; this work builds on Erik Meyer's stages for faculty's adoption of threshold concepts (2012) and James Cronin's (2013) work on the role of reflection and empathy towards learners. The stages categorize potential teaching practices that promote threshold capabilities in teaching in order to promote student capabilities. Finally, these stages illustrated further thresholds to traverse as participants, both TAs and students, learn central disciplinary concepts. Apart from the important focus on TA development, the next frontier for threshold concepts in large lecture courses would be to investigate the student role further, possibly within longitudinal studies across several history courses where uptake of threshold concepts could be traced.

What I have learned is that threshold concepts afford teachers an opportunity to rethink the goals and principles that drive their course. To address the organizational design problem of embedding threshold concepts in a large course, I was able to specify what needs to happen within an important level in the learning system: the TAs. In this study, the threshold capabilities delineated the TA teaching strategies to help students exhibit the actions of an historian when approaching primary sources. The particular historical strategies

introduced in the lectures represented the actions needed on the part of students to cross thresholds. The lens of looking at a course as a large system allowed me to articulate these distinctions in terms of what the effects of introducing threshold concepts in a course are and the actions and processes inherent to understanding these concepts.

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Appendix A. Characteristics of expert historians. Voss and Wiley, 2006

Obtaining Information	Narrative Construction and Analysis	Reasoning & Problem-Solving
1: Historians evaluate sources emphasizing original and authentic information.	5: Historians have the goal of constructing narratives, based on evidence, that provide a reasonable account of particular historical events and actions. As such, narratives are rhetorical constructions aimed at building a case for a particular position in a manner persuasive to readers.	9: In an "open," "ill-structured" discipline like history, evidence or justification for a claim or conclusion usually is verbal. Methods for reasoning are analogy, decomposition, hypothesis or scenario generation (what if?) and thought experiments.
2: Experts use at least three heuristics in their analysis of sources, corroboration, and contextualization.	6: Narrative quality is related to five components: coherence, chronology, completeness, contextualization, and causation.	
3: When analyzing sources, historians develop mental representations of the events and activities discussed in the text (situation models) and also generate subtext.	7: Historical narratives, although chronological, do not consist of linear chains; they typically have both narrative and expository components.	10: Causal reasoning in history faces at least two issues: the general absence of control groups and the presence of temporally antecedent events. Attempts to deal with these matters include, respectively, counterfactual reasoning and the categorization of prior events.
4: Historians show expert-expert differences in performance based on differences in areas of specialization, but they show similarities in the use of domain-related skills.	8: Alternative narratives about a particular topic account for differences in interpretation. <ul style="list-style-type: none"> • Alternative narratives may be written because of differential source use and interpretation. • Historians may produce alternative narratives because of differences in the time at which they write. • Alternative narratives are found in countries in which the government and the citizens are not in agreement regarding historical political-social thinking. • Alternative narratives are produced in classrooms by differences in students' cultural backgrounds. 	
<i>Compiled from Voss and Wiley, 2006.</i>		

Appendix B. Example of a chart to show findings from interview excerpts related to concept lectures.

HT Lecture	Student K.	Relation of this HT lecture to TA2's discussion section	Survey Responses from StudentK: History Definitions
<p>Thesis statement (HT4)</p>	<p>“The thesis statement [HT Lecture] was most helpful to me because I am not a writing expert ... and history papers are really different from regular English papers or things like that so when he went into detail about what kind of thesis statement you need for a history paper, he showed those examples and this would be better, the more specific you are and that helped me guide myself and then I went to Tim and he was even more helpful, but that lecture was helpful considering that most of our grade was based off of those papers.”</p> <p>[00:04:21.25] definitely the example on the lecture slide and he had two examples of a good and then one of a better and one was a B or A so that helped a lot and just like him explaining what makes it better so he says this is good but the more specific you are to one topic so it is not just about slavery as a general it is something specific that happened within that event of whatever we are talking about in history. So I thought that was the most helpful. Any writing tip I get is helpful because I am just a bad writer so I always like to pay extra attention to that.</p>	<p>Her TA wanted to know why she thought he talked about the HT4 when in fact he did not. It just happened that the day when he decided to address thesis statements supported the HT4 lecture.</p> <p>Note: the thesis statement workshop in discussion section happened the week <i>before</i> the HT4 lecture</p> <p>[00:02:32.04] SM: Something that was interesting in the survey is that you indicated TA2 had mentioned that historical thinking class in discussion section and I was curious how you made that connection.</p> <p>[00:02:49.13] Student K: well, the thesis statements, well when he talked about papers and stuff like that he kind of referred to it, obviously, because he said or he mentioned certain tips on how to write your papers so I just thought ok, I just put them together.</p>	<p>Past courses: 2B Currently taking: 17C</p> <p>[TA2 is working for 17C after having taught 17A]</p> <p><i>Would you say your definition of studying history changed as a result of taking this course?</i> Yes</p> <p><i>Application to history courses</i> The tips for history papers, And analyzing primary and secondary documents</p> <p><i>She claimed her beginning definition of history was:</i> Study of the past</p> <p><i>Her ending definition:</i> A compilation of events, stories, traditions, thoughts, ad emotions. History gives us a lot of insight about many aspects of current life</p>

<p>Contested Narrative</p>	<p>Memorable discussion section moment:</p> <p>[00:10:59.04] StudentK: yeah, the Abraham Lincoln is the most memorable because he asked us three questions [one question, three times] and “who freed the slaves?” and I remember thinking ... he said if you ask historians they say ‘I don't know it is complicated’ and he asked us this question at the beginning of section and then after we re-analyzed those documents and everyone shared, he asked the question again and we were all, I don't know, it is complicated.</p> <p>You start to kind of ... just this small amount of history background we start to think kind of like a historian in a way. So after that, I still don't know and I wrote my paper on it.</p>	<p>HT1 was not discussed in section but her description of this discussion section moment recalled the contested narrative description</p> <p><i>TA perspective on same section :</i></p> <p>[00:29:25.08] SM: did any of these historical thinking lectures affect how you structured your discussion section?</p> <p>[00:29:37.19] TA2:I'm trying to think of a concrete example. They did definitely, I'm sure. I think the one ... so ... this is not as concrete as I had hoped to give you but one sort of general idea of what one thing that happened is ... with these kind of lectures, these little mini-lectures, in addition sort of part and parcel of that was that Dr. Majewski tried to focus on one big idea for the day for the most part. Afterwards and sort of incorporate and it was as important as the mini-lectures themselves is running through this one idea.</p> <p>[00:30:24.07] TA2: And I think a lot of my sections I tried to narrow down the idea ... and towards the end especially when I was sending out questions ahead of time, I would explicitly say this is the big question for the day, this one. And I think better ... better than having 18 questions on minutiae.</p>
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Appendix C. 2013 TA Interview Protocol

TA Interview

The interviews will be semi-structured and dependent on the implementation of the historical thinking lectures and what will be observed in the discussion sections. However, the questions will focus on the perceptions of the instructors on the impact of the historical thinking lectures and additional reading checks given the by the participating TAs. These interviews will occur at the end of quarter.

Focus of the interview rests in hearing the historical thinking lectures and incorporating them – what choices did they make that supported this thinking? What did they omit? What had no impression on them whatsoever?

Warm-Up

1. I know we discussed this at some point, but what is your teaching history?
2. What classes have you taught history classes before TA'ing in History 17B?
3. What was your initial reaction to the idea of teaching 17B?
4. I'd like to ask about a few mechanics of the course.
5. Did you set up your own primary source reading guide the first week of classes? If so, where did it come from? How does it connect with Majewski's reading of primary sources?
6. Each week a TA comes up with discussion questions. Do you use those plans or do you prefer to work on your own?

Historical Thinking

Majewski works with a theoretical concept called threshold concepts. At one point her mentioned sending you all an article about it. The basic premise is that “threshold concepts, “represent how people ‘think’ in a particular discipline, or how they perceive, apprehend, or experience particular phenomena within that discipline—gaining entry into the discipline requires crossing these thresholds.

Based on the concepts Professor Majewski focused on this quarter, which ones resonated most with you?

HT1: Meaningful & Contested Narratives;
HT2: Analyzing Primary Sources (Professor Majewski on Video);
HT3: Historical Empathy;
HT4 Thesis statements can be more than one sentence;
HT5: Causation & Counterfactuals;
HT6: Historians and how they argue (frontier thesis)
HT7: What Makes Historians Unique (Overview of all historical thinking skills)

- How did these lectures inform how you structured your discussion if at all? What are ways you emphasized the points of the lecture in your discussion section(s)?
- What student evidence (discussion comments, papers, questions to you) can you point to that demonstrates their thinking on historical thinking?
- What do you hope students take with them as they progress in other history or humanities courses?

Wrap-Up

- Do you see yourself within any of these thresholds in your own work?
- What would you add to this list if you were teaching in this way?

Appendix D. 2013 Student Interview Protocol

Student Interview

*The interviews will be semi-structured and dependent on the responses of students to the online surveys; implementation of the historical thinking lectures and what will be observed in the discussion sections. However, the questions will focus on the perceptions the students had on the impact of the historical thinking lectures and additional reading checks given the by the participating TAs. These interviews will occur **after** the winter quarter.*

Were there some historical thinking lectures that were more difficult to understand? (troublesome)

1. What courses are you taking now in the spring quarter? Any history courses?
2. Based on your responses to the last online survey in History 17B, you mentioned the following mini-lectures (list them) as memorable to you. Please elaborate on what was most memorable to you.
3. What particularly helped you in your understanding of this concept? The lecture? The discussion section? A particular assignment?
4. What concepts will you apply or do you find helpful in your other courses (if any)?
5. Professor Majewski chose these mini-lectures because he determined that these were important skills to possess in his discipline. If you were Professor Majewski, what are some other ways you would introduce these concepts to students?

Note: Further questions will be developed based on particular observations from discussion sections.

Appendix E. History 17B 2013 Syllabus

**History 17B Introduction to
Historical Thinking:
Contested Visions of American Liberty,
1840-1920**

Instructor: Professor John Majewski
Office: Humanities and Social Sciences 4220
Phone: 893-2837
Email:

majewski@history.ucsb.edu Office

Hours: F 9-11 and by appointment.

Course Website: Gaucho Space

Time and Room: MWF, 2:00-2:50, IV Theater

Introduction: Students who have not taken a college history course might think that history consists of “one damned fact after another.” This class will be far different. You will not be asked to memorize presidents or state capitals, but to analyze the past from the perspective of a historian. The course tries to convey how historians think. Historians analyze the past in the form of meaningful and contested narratives. For a historian, a narrative is an account of the past that is organized chronologically. Because historians like to think and write in the form of narratives, they are big believers in context—facts about the past take on meaning when they are related to other facts. The emphasis on context highlights the importance of primary sources, which are documents and artifacts produced by actual historical actors.

We will be exploring the importance of contested narratives, context, and primary sources via the history of the United States from 1840 to 1920. We will focus on how the expansion of commerce, the growth of cities, the settlement of the West, and the rise of big business created divisive social and political conflict. Our goal is to understand how Americans debated the meaning of liberty, equality, and other political creeds. As we shall see, the very idea of American identity-- what does it mean to be an American?— was debated by a variety of different groups, including wealthy merchants, slaveholding planters, ordinary farmers, immigrants, Native Americans, slaves, and middle-class women.

Your job will be to think about the readings and discuss their significance in your weekly discussion meetings. This will take some hard work, but the rewards will be great. By the end of the course, you should have a much better understanding of how conflict in the past has influenced today’s ideas and debates. You will begin to think like a historian—and understand how historical thinking differs from other disciplines on campus.

Readings: The following books are required reading. The readings can either be purchased at the UCSB bookstore or read on reserve at the library. It is very important that

you do the assigned reading every week. The textbook (The American Promise) provides a concise overview of basic events. It will not be enough to come to section having read only the textbook: you must do the other readings as well!

John Majewski (ed.), History of American Peoples, 1840-1920: A Primary Source Reader. (Please note that you will need the SECOND EDITION or else you will not have crucial documents).

Roark, The American Promise (Value edition, 4th edition).

David W. Blight (ed.), Narrative of the Life of Frederick Douglass (2nd edition) Reader available at Alternative Digital Copy at the UCEN

Grading: Grades will be based on lecture attendance, two papers, the final, and performance during discussion section. The exact breakdown is as follows:

1. First Paper: 20 percent (**due Monday, Feb. 11**)
2. Second Paper: 25 percent (**due Monday, March 4**)
3. Discussion Section: 20 percent
4. Attendance at I-clicker lectures: 5 percent
4. Final: 30 percent (**Monday, March 18 @ 4:00-7:00 pm, IV Theater**).

The papers will cover topics that will give you the chance to apply the primary source readings in constructing your own arguments. Your TA will give you more information—including format instructions and writing advice—as the quarter progresses. The final will consist solely of essay questions which will be given out in advance.

All grading will be done by your TA. If you disagree with your TA over a grade, you may appeal to me only after discussing the issue first with your TA. Every appeal to me must be in writing specifying exactly why you believe your grade should be raised. I reserve the right to lower as well as raise grades in appeal situations. **All appeals must be initiated within one week after an assignment has been returned to students.**

Please be advised that plagiarism or any other form of cheating will not be tolerated in 17b. Any student caught turning in work other than their own will receive an automatic “F” in the course and disciplinary action from the University.

Students must earn a passing grade in section to pass the course. You should keep in mind that three unexcused absences will result in an automatic “F” in section.

SPECIAL NOTE: This is a large class, so please do not talk, read newspapers, or engage in other distracting behaviors. Please turn off your cell phones as you enter class.

If you need disability-related accommodations in this class, if you have emergency medical information you wish to share with me, or if you need special arrangements in case the building must be evacuated, please see me after class or in my office.

Schedule of Weekly Lecture Topics and Readings

Part I: A Fractured Republic

I. American Society in 1840

Jan. 7: Introduction to Historical Thinking

Jan. 9: America in 1840: Why Was the Market Revolution So Important?

Jan. 11: Understanding the Links between Separate Spheres and Middle-Class Women

Reading: Roark, American Promise, 303-321

Majewski, History of the American Peoples, 3-8

II. Domestic Ideology and Moral Reform

Jan. 14: Separate Spheres and Reform (Historical Thinking: Reading a Primary Source) Jan. 16: Why Was Abolitionism So Radical?

Jan. 18: Why Was the Women's Rights Movement Even More Radical?

Reading: Roark, The American Promise, 301-303, 321-330, 357-362

Majewski, History of the American Peoples, 9-25

Narrative of the Life of Frederick

Douglass, 1-52. III. An Empire for Liberty?

Jan. 21: Holiday

Jan. 23: Native Americans and Western Expansion

Jan. 25: Slavery and Western Expansion (Historical Thinking: Writing a History Paper)

Reading: Roark, American Promise, 365-394

Narrative of the Life of Frederick Douglass, 52-125

IV. Was the South an Exception to American Exceptionalism?

Jan. 28: Soils, Slavery, and the Southern Economy (Historical Thinking: How Historians Argue) Jan. 30: How Did Slaves Influence Politics?

Feb. 1: Why Did Northerners Oppose Slavery? Free-Labor Ideology and the Mexican War

Reading: Majewski, History of the American Peoples, 29-48

Roark, American Promise, 395-416

Majewski and Thackerian, "Shifting Cultivation,"

(Course Reader) Marc Egnal, Clash of Extremes, 123-149 (Course Reader)

V. Why did Northerners Oppose the Expansion of Slavery?

Feb 4: The Formation of the Republican Party and the Tumultuous Politics of the 1850s
Feb. 6: Why Dred Scott and John Brown Mattered
Feb. 8: Secession and the Coming of War (Historical Thinking: Causation and Counterfactuals)

Reading: Majewski, History of the American Peoples, 37-60
Roark, American Promise, 339-365, 405-436
James Oakes, The Radical and the Republican, 87-110 (Course Reader)

VI. Did the South Really Lose the Civil War?

Feb. 11: The Civil War as Total War (**First Paper Due**)
Feb. 13: Did the Slaves Free Themselves? (Historical Thinking: Lincoln and Memory) Feb. 15: Was Reconstruction a Failure?

Reading: Majewski, History of the American Peoples, 61-85.
Roark, American Promise, 425-488
James McPherson, "Who Freed the Slaves?" (Course Reader)

Part II: Political Responses to the Rise of Big Business

VII. The Rise of Big Business

Feb. 18: Holiday
Feb. 20: Big Business and the Changing U.S. Economy
Feb. 22: Big Business Settles the West (Historical Thinking: Debating the Transcontinental

Railroads)

Reading: Majewski, History of the American Peoples, 93-125
Roark, American Promise, 489-535
Richard White, Railroaded, 455-493 (Course Reader)

VIII. Radical (and not so Radical) Responses to Corporate America: The Populists and Progressives.

Feb. 25: Native Americans in the New Industrial Age
Feb. 27: The Gold Standard and Populism
Mar. 1: Debating T. R. and Jane Addams: How Do We Define Progressivism?

Reading: Majewski, History of the American Peoples, 126-157
Roark, American Promise, 586-605, 647-683

IX. Racism and the Development of American Culture

Mar. 4: African American Responses to the Rise of Jim Crow (**Paper #2 Due**)
Mar. 6: Why Did the U.S. Become an Imperial Power?

Mar. 8: Race, Masculinity and the New Culture of Sports (Historical Thinking: History vs. Other Disciplines).

Reading: Majewski, History of American Peoples, 163-92

Roark, American Promise, 605-613

Jackson Lears, Rebirth of a Nation, 200-221 (Course Reader)

X. A Different Kind of Political Power: The Suffrage Movement in the Progressive Period

Mar. 11: The Suffrage Movement in the Progressive Era

Mar. 13: World War I: The Last Progressive Crusade

Mar. 15: The Big Questions of the Nineteenth Century (Historical Thinking and Your Exam). Final

Reading: Majewski, History of the American Peoples, 193-209

Roark, American Promise

Reading Primary Documents

- 1) Who wrote the document?
 - a. Do you know anything about this person? Does this document confirm or contradict what you think you know about them?

- 2) What is the document? To whom it is addressed?
 - a. A letter? A memo? A diary entry? A newspaper article? What information does it present? Is that information correct? If not, why? Might the inaccuracies be deliberate?
 - b. Who did the author think might read it? How might the form of the document affect its significance?

- 3) When and where was it written?
 - a. Not just the date and place, but more importantly, what was the context? What was going on in the world when the document was written?

- 4) Why was it written?
 - a. What did the author hope to accomplish by writing this? Did the author want to convince someone of something? Did he or she want to defend something they may have done?
 - b. Is the document biased? Why or why not? How can you tell? Does the author have political or religious leanings that could affect their objectivity? Is the author associated with a special-interest group?
 - c. What is the author's central claim or thesis? How does the author support their claim? Does the author use evidence fairly? Are the author's assumptions questionable? Does the author consider the opposing arguments and refute them persuasively? Does the author use sound logic?

Appendix G. 2014 History 17B Syllabus

History 17B
Introduction to Historical Thinking:
Contested Visions of American Liberty, 1840-1920

Instructor: Professor John Majewski
Office: Humanities and Social Sciences (HSSB) 4220
Phone: 893-2837
Email: majewski@history.ucsb.edu

Office Hours: M 12-2 and by appointment.

Time and Room: MWF, 9:00-9:50, IV Theater

Introduction: Students who have not taken a college history course might think that history consists of “one damned fact after another.” This class will be far different. You will not be asked to memorize presidents or state capitals, but to analyze the past from the perspective of a historian. The course tries to convey how historians think. Historians analyze the past in the form of meaningful and contested narratives. For a historian, a narrative is an account of the past that is organized chronologically. Because historians like to think and write in the form of narratives, they are big believers in context—facts about the past take on meaning when they are related to other facts. The emphasis on context highlights the importance of primary sources, which are documents and artifacts produced by actual historical actors.

We will be exploring the importance of contested narratives, context, and primary sources via the history of the United States from 1840 to 1920. We will focus on how the expansion of commerce, the growth of cities, the settlement of the West, and the rise of big business created divisive social and political conflict. Our goal is to understand how Americans debated the meaning of liberty, equality, and other political creeds. As we shall see, the very idea of American identity-- what does it mean to be an American?—was debated by a variety of different groups, including wealthy merchants, slaveholding planters, ordinary farmers, immigrants, Native Americans, slaves, and middle-class women.

Your job will be to think about the readings and discuss their significance in your weekly discussion meetings. This will take some hard work, but the rewards will be great. By the end of the course, you should have a much better understanding of how conflict in the past has influenced today’s ideas and debates. You will begin to think like a historian—and understand how historical thinking differs from other disciplines on campus.

Readings: The following books are required reading. The readings can either be purchased at the UCSB bookstore or read on reserve at the library. It is very important that you do the assigned reading every week. The textbook (The American Promise) provides a concise overview of basic events. It will not be enough to come to section having read only the textbook: you must do the other readings as well!

John Majewski (ed.), History of American Peoples, 1840-1920: A Primary Source Reader. (Please note that you will need the THIRD EDITION or else you will not have crucial documents).
Roark, The American Promise (Value edition, 5th edition).
David W. Blight (ed.), Narrative of the Life of Frederick Douglass (2nd edition)
Nancy Cott, Bonds of Womanhood (2nd Edition)

Timothy Egan, The Big Burn (The book is FREE as part of UCSB Reads).

I-clicker (students will receive points for using their i-clicker beginning Week 2)

Grading: Grades will be based on lecture attendance, two papers, the final, and performance during discussion section. The exact breakdown is as follows:

1. First Paper: 20 percent (**due Friday, Feb. 7**)
2. Second Paper: 25 percent (**due Friday, Feb. 28**)
3. Discussion Section: 20 percent
4. Attendance at lectures via i-clicker: 5 percent
5. Final: 30 percent (**Wednesday, March 19 @ 8:00-11:00 am, IV Theater**).

The papers will cover topics that will give you the chance to apply the primary source readings in constructing your own arguments. Your TA will give you more information—including format instructions and writing advice—as the quarter progresses. The final will consist solely of essay questions which will be given out in advance.

All grading will be done by your TA. If you disagree with your TA over a grade, you may appeal to me only after discussing the issue first with your TA. Every appeal to me must be in writing specifying exactly why you believe your grade should be raised. I reserve the right to lower as well as raise grades in appeal situations. **All appeals must be initiated within one week after an assignment has been returned to students.**

Please be advised that plagiarism or any other form of cheating will not be tolerated in 17b. Any student caught turning in work other than their own will receive an automatic “F” in the course and disciplinary action from the University.

Students must earn a passing grade in section to pass the course. You should keep in mind that three unexcused absences will result in an automatic “F” in section.

SPECIAL NOTE: This is a large class, so please do not talk, read newspapers, or engage in other distracting behaviors. Please turn off your cell phones as you enter class.

Schedule of Weekly Lecture Topics and Readings

Part I: A Fractured Republic

I. American Society in 1840

Jan. 6: Introduction: History as a Way of Thinking (HT1)

Jan. 8: America in 1840: Why Was the Market Revolution So Important?

Jan. 10: Understanding the Links between Domestic Ideology and Middle-Class Women

Reading: Roark, American Promise, 303-321

Majewski, History of the American Peoples, 3-6

Cott, The Bonds of Womanhood, 1-18, 63-100

II. Domestic Ideology and Moral Reform

Jan. 13: Domestic Ideology and Reform (HT2: Primary Sources)

- Jan. 15: Why Was Abolitionism So Radical?
Jan. 17: Why Was the Women's Rights Movement Even More Radical?

Reading: Roark, The American Promise, 301-303, 321-330, 357-362
Majewski, History of the American Peoples, 7-28
Cott, The Bonds of Womanhood, 101-196

III. An Empire for Liberty?

- Jan. 20: Holiday
Jan. 22: Native Americans and Western Expansion
Jan. 24: The Politics of Slave Culture and Resistance

Reading: Roark, American Promise, 365-394
Narrative of the Life of Frederick Douglass, 1-119

IV. How Do We Explain the Civil War?

- Jan. 27: Why Did Northerners Oppose Slavery? Free-Labor Ideology and the Mexican War
Jan. 29: The Formation of the Republican Party and the Tumultuous Politics of the 1850s
Jan. 31: Abraham Lincoln and the Secession Crisis

Reading: Majewski, History of the American Peoples, 29-55
Roark, American Promise, 339-357, 395-422

V. Why did Northerners Oppose the Expansion of Slavery?

- Feb 3: The Civil War as Total War
Feb. 5: Did the Slaves Free Themselves?
Feb. 7: Was Reconstruction a Failure? (**First Paper Due**)

Reading: Majewski, History of the American Peoples, 57-81
Roark, American Promise, 425-488

VI. The Racial Politics of Western Settlement

- Feb. 10: Frederick Jackson Turner, the Transcontinental Railroads, and the West
Feb. 12: Native Americans in the Industrial Age
Feb. 14: The Politics of Race in California

Reading: Majewski, History of the American Peoples, 85-98
Roark, American Promise, 489-518

Feb. 17: Holiday

- Feb. 19: Big Business and the Changing U.S. Economy
Feb. 21: Unionism: Pragmatism vs. Radicalism

Reading: Majewski, History of the American Peoples, 99-116
Roark, American Promise, 521-535, 565-577
Egan, The Big Burn, 1-104

VIII. Radical (and not so Radical) Responses to Corporate America: The Populists and Progressives.

- Feb. 24: The Gold Standard and Populism
Feb. 26: Debating T. R. and Jane Addams: How Do We Define Progressivism?
Feb. 28: The Big Burn: Progressives and Conservation (**Paper #2 Due**)

Reading: Majewski, History of the American Peoples, 119-149
Roark, American Promise, 586-605, 617-648
Egan, The Big Burn, 105-286

IX. Why was the Progressive Era so Racist?

- Mar. 3: African American Responses to the Rise of Jim Crow
Mar. 5: Why Did American Become an Imperial Power?
Mar. 7: Race, Masculinity and the New Culture of Sports

Reading: Majewski, History of American Peoples, 151-168
Roark, American Promise, 536-541, 605-613

X. A Different Kind of Political Power: The Suffrage Movement in the Progressive Period

- Mar. 10: The Suffrage Movement in the Progressive Era
Mar. 12: World War I: The Last Progressive Crusade
Mar. 14: The Big Questions of the Nineteenth Century (Historical Thinking and Your Final Exam).

Reading: Majewski, History of the American Peoples, 169-181
Roark, American Promise, 651-673

TA Guide for History 17B | Winter 2014

1. Section and Section Grades. I believe in giving teaching assistants as much autonomy as possible in formulating section strategies and content. However, there are two general guidelines that I wish you to follow: devote at least 35 minutes of every section to some form of discussion, and make participation in classroom count at least 50 percent of section grade. This means that announcements, quizzes, and mini-lectures should take up no more than 15 minutes; it also means that section quizzes should count for no more than half of your section grade. The rationale behind this policy should be obvious: we want the students discussing the material!

I also want you to incorporate some of the five keys to historical thinking throughout your sections. This is best done incrementally—one point here, another point there. The keys to historical thinking are so broad that there will be many different ways and strategies for integrating them into your weekly discussions.

Students who have a B- or worse for their section grades should have a short progress report attached to their first and second papers. These progress reports—no more than a few sentences in length—will serve as a wake-up call to students while providing tangible proof that students have been forewarned that their section performance is costing them dearly.

2. History 500 Meetings. The primary goal of these meetings is to hash out among ourselves possible strategies for dealing with each week's reading and themes. To that end, everyone will be assigned a week in which they will become the "expert" and produce a handout (study questions, for example) that the other TAs can use in their sections. The expert will also provide help in linking the week's material to the keys to historical thinking. The questions and handouts that the week's expert produces is optional—you will mostly likely incorporate that material into your own study plan. For weeks in which you are not the expert, you will still be expected to contribute to our sessions as much as possible.

3. Course Themes and Section Content. You are free to focus discussion on any issue or issues that you find most pertinent in the week's reading and lectures. I only ask that you stay true to the general course themes – do not introduce additional reading or topics.

4. Section Syllabus. You should produce a syllabus for your sections that outlines your office hours, section format, quiz policy, and so on. Please give me a copy of your syllabus by the end of the first week, as it will help me write your teaching evaluation.

5. Section Visits. I will observe your teaching at least once during the quarter. If you would like me to visit a problem section during the course of the quarter, I will be more than happy to do so.

6. Lectures. Please attend all of my lectures—it sets a good example for the students and allows them to meet with you afterwards. If you cannot make a lecture, please let me know in advance.

Appendix I. Five Keys to Historical Thinking
Five Keys to Historical Thinking

1. *History consists of **meaningful and competing narratives** about the past.*

A narrative is a nice scholarly term for a story in which things change over time. History is the construction of such stories with the use of evidence, either drawn from the accounts of other historians (secondary sources) or from historical actors themselves (primary sources). Because these narratives are so important to us, any given historical narrative usually has competitors—an alternate story to explain the same events. This does not mean that all historical narratives are created equal, as some narratives are more logical and better fit the known evidence than others.

2. *The meaning of any given historical narrative is often tied to the present. Historians, though, are always fearful of importing **the present into the past**.*

Historians do not choose questions and narratives randomly, but rather write stories that have meaning and significance to the present. Historians, though, dislike when the present intrudes too much into the past, which is called presentism. Historians like to see the past as fundamentally different from the present, even as we recognize that history and the present are always linked.

3. *Historians strive to be as accurate as possible, but they also know that the narratives they produce reflect their own **perspective and personality**.*

Historians strive for accuracy in getting facts right and interpreting sources correctly, but historians also recognize that their experiences, personality, and outlook shape the history they write.

4. *History is based on **sources and artifacts**, but their meaning critically depends on context--the time, place, and circumstances in which they were produced.*

Consider a single piece of historical evidence, whether it is a piece of pottery, a political speech or a painting. Considered by itself, the source or artifact has relatively little historical significance—it needs to be put into a particular context of place and time. Consider any single piece of historical evidence as part of a jigsaw puzzle. It does not do much good alone, but can help complete a picture when put together with other pieces.

5. *Historians **must practice intellectual empathy**—the ability to put yourself in somebody else’s shoes—but still maintain the ability to judge historical actors.*

Historians want to understand the perspective of historical actors, so it is vital that historians have the imagination to try to see the world from different perspectives. At the same time, historians also judge historical actors. Historians, for example, strive to understand the perspective of southern slaveholders, but still judge slavery an immoral institution.

Primary Source Reading Guide: Balancing Historical Context and the Present

*"We have to put the primary source within a specific context. When it was written, when it was produced. **That's what being a historian is all about.** It is trying to understand all of the connections with what's been written, who wrote it, what was their underlying purpose, and how that fits in with that time period."*

<p>Establish the Basics: Author & Date</p>	<p>Context is a key part of historical thinking, so right way you want to know right away who is producing the document as well as when are they producing the document.</p>
<p>What do you already know about the author or this document?</p>	<p>As you read the document, you want to keep in mind what you know about the period and what you know about the person.</p>
<p>Is there anything about the document you do not understand?</p>	<p>There will be inevitable moments of chaos and confusion when you suddenly doubt your own understanding of what the document means. Embrace those moments as a learning opportunity, and ask specifically what does not make sense to you. Be comfortable with chaos and confusion as starting points for raising additional questions for discussion.</p>
<p>Why was it written?</p>	<ul style="list-style-type: none"> • Audience: Who did the author think might read it? • Form: How might the form (letter, diary, report, chapter, article, etc.) of the document affect its significance? • Persuasion: Who is the author trying to convince? • Bias: Does the author have political, religious, or special-interest leanings that could affect their objectivity? • Purpose/Motivation: What did the author hope to accomplish by writing this?
<p>What is the main claim/argument/thesis?</p>	<ul style="list-style-type: none"> • Argument: What is the author's main argument or thesis? • Evidence: What evidence does the author use to support this argument?
<p>What is the context of this document?</p>	<p>You will want to understand the document within a specific historical context, but also want to draw out meanings and connections that are important to you.</p> <p>You will want to understand, for example, what Lincoln's various speeches on slavery meant to nineteenth-century audiences, but you will also draw your own conclusions and find your own meaning.</p> <p>The intersection of the past and the present makes life interesting for historians, and how you balance them is very important.</p>