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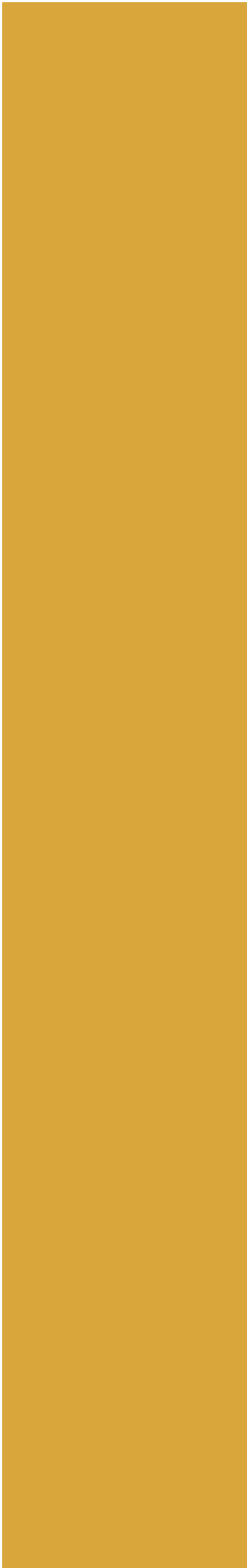James Goulding

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Articles

Students' historicisation of the environmental crisis: A narrative of industrialisation, ignorance and greed

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ABSTRACT

As the field of history education begins to acknowledge the need to respond to the challenges of the Anthropocene, questions arise concerning students' ability to use history to make sense of pressing environmental issues. To address this, 67 Swedish upper secondary school students were asked to historicise issues like global warming and share their ideas concerning the present and the future. Within the framework of Jörn Rüsen's narrative theory, this article analyses how and to what extent these students experienced and interpreted the past and used history to orient themselves in relation to such issues. It also develops on the outcome of this process. While most students historicised the situation, many students made limited use of history. Their typical narrative can be described as a linear story of historical industrialisation driven by the hunger for progression and wealth and facilitated by ignorance. It was told with little detail or reference to evidence and in a way that generally seemed unsupported by historical thinking. Moreover, their typical narrative mostly aligned with the standard science-based Anthropocene narrative, lacking cultural and political perspectives. Although their orientations varied, students focused on technical solutions and lifestyle adjustments rather than civic engagement and politics. Students were worried about the future. However, the narrative of technological and scientific progression and the belief that people in the past lacked awareness and technological alternatives gave students hope. On the other hand, viewing them as informed or inherently selfish contributed to pessimism. Supported by theoretical work, the findings indicate ways school history may support students' ability to deal with Anthropocene issues, helping them to experience and interpret the past and the present in a more nuanced and elaborate way. They also highlight the need for content that aids students' ability to anticipate Anthropocene scenarios and reflect on strategies for engagement.

Introduction

Environmental history has been a vibrant subfield of disciplinary history for more than half a century. And it has been well over a decade since works like Chakrabarty's seminal "Climate of History" (2009) sparked the historical Anthropocene debate, addressing the premise that Earth has entered a new epoch, defined by humanity as a planetary force. This debate is now the arena for competing narratives that feed from, and into, the public environmental discourse and history culture. Despite this, the field of history education has been hesitant to engage with the global environmental crisis and the Anthropocene and has only recently begun to address them theoretically. However, we still lack a basic empirical understanding of most aspects related to teaching history in a way that prepares students for grappling with the challenges of the Anthropocene.

This article aims to contribute to the understanding of how students use history to orient themselves in relation to Anthropocene issues, i.e., large-scale anthropogenic environmental changes. It presents examples of how students in Sweden's upper-secondary school narrate the emergence of the global environmental crisis and how this correlates with their views about the present and their prospects for the future. Furthermore, we hope to add to the discussion regarding school history's role in supporting action-oriented learning in the context of the Anthropocene. These goals intermingle as narrative theory and previous research guide the analysis, and the empirical conclusions feed the understanding of how history teaching might prepare students for dealing with issues such as climate change.

We ground our investigation in the concept of historical consciousness from the premise that people's perception of the relationship between the past and the present shapes their identities, how they experience and engage with contemporary issues, and their visions and feelings about the future. Analytically, it aims to elucidate the students' narratives by relating them to research and theories on historical thinking and teaching, environmental narratives, and narrative theory. The research questions are: i) How do students make sense of environmental issues by referring to historical content and formulating historical explanations? ii) How do students orient themselves in relation to their experiences and interpretations?

Previous research

In recent years, some contributions have opened the debate on the future of history education in the Anthropocene. In addition, research within environmental and sustainability education (ESE) and the environmental humanities (EH) offer insights and perspectives that can inform history teaching. Nevertheless, the potential of teaching school history in a way that engages with Anthropocene issues is only beginning to be explored (Hawkey, 2023), and much work is needed to decide on its priorities and methods. In particular, there is a lack of empirical research on the thoughts of students and teachers and viable approaches in history education.

Numerous studies have examined students' ability to engage with historical content and questions and construct historical accounts, mostly without emphasis on specific historical topics. This research has identified a range of conceptions and patterns common in students' historical

narratives. These can often be understood as "narrative simplifications" (Barton & Levstik, 2004, pp. 132–136) as students use familiar narrative structures to make sense of the past in ways that reduce its complexity and fill the gaps of the unknown.

A key finding is that many students personalise historical causation by viewing all events as explainable by someone's or something's intentions. Especially there is a tendency to attribute historical changes to the will of powerful people in a way that ignores structural conditions, unintended outcomes, and the interplay of various causes (Halldén, 1998; Lee, 2005; Lee & Shemilt, 2009; Seixas & Morton, 2013; Voss et al., 2001). In addition, this is often done without accounting for the actors' historical context and perspectives. Instead, students typically apply a universalist approach based on presentism when analysing and judging people's actions in the past (Lee, 2005; Lee & Ashby, 2001; Seixas & Morton, 2013). However, as Miles and Gibson discuss (2022), it is debated whether students' presentist perspectives should be considered problematic per se or whether they are something teachers should aim to improve rather than condemn. Furthermore, studies showing the impact of students' familiarity with the subject at hand indicate that their ability to apply historical thinking depends on their historical content knowledge (Huijgen et al., 2017; van Boxtel & van Drie, 2018).

Somewhat paradoxically, it is common for students who understand causality beyond personalisation to perceive historical events as inevitable without discerning possible alternatives. As a result, they often view history as a linear progression with no alternative outcomes and take the present situation for granted. Such an understanding of history is especially prevalent when students deal with processes over longer timespans. Various works attribute this lack of counterfactual imagination to an inability to comprehend how people's actions influence the trajectory of history within the limits of available paths (Lee, 2005; Lee & Shemilt, 2009; Seixas & Morton, 2013; Shemilt, 2000).

In ways that bring this strand of research closer to works concerned with historical consciousness and learning as "Bildung", scholars such as Barton, Levstik, and Seixas have discussed how students' historical thinking may influence their civic competence, ethical consideration, and orientation towards action. Barton and Levstik (2004) argue that school history should be aimed at qualifying students' ability to participate actively in a pluralist democracy. They recommend that students explore things such as multiperspectivity, complex causality, agency, and counterfactual history to advance their ability to make sensible decisions on policy issues and act on them. In ESE, such a focus on engagement is common. Moreover, multiperspectivity is a key feature of what Öhman and Östman (2019) call the pluralistic teaching tradition, aimed at supporting students' understanding of conflicting perspectives in the debate concerning environmental and sustainability issues and stimulating democratic deliberation.

Although we know of no study of students' historical narratives vis-à-vis environmental issues, there are comparable studies concerning other content. Lévesque et al. (2012) analysed students' historical consciousness of the nation through their narratives. Their study showed that the students' accounts were simplified and naive from a disciplinary standpoint but organised around different conflicting narrative templates they encountered in history culture. It also showed how the students framed their accounts within specific orientations. They concluded:

> Students seem to make use of those narrative templates because it provides them with an affordable tool to comprehend past complexities. These narrative simplifications serve also another practical function: it sets forth a temporal direction for situating oneself within the 'course of the nation'. (Lévesque et al., 2012, p. 58)

These findings indicate that it is critical to consider public narratives when analysing students' accounts and narrative processes and designing history education.

As discussed by Bonneuil (2015), every way of telling the story of the Anthropocene and the global environmental crisis points to the significance of certain actors, periods, forces, and phenomena while shadowing others, implicitly or explicitly making statements of causality and morality. Although it is not within the scope of this article to engage with the variety of stories

thoroughly, the works of Bonneuil and other EH scholars identify several competing perspectives in the academic and public debate.

According to this research, the standard narrative presents the Anthropocene as something late and rather unexpected: an unintended consequence of modernity and human progress, which revelation now works as an alarm bell to rally action. It challenges the nature-culture divide, plays out over geological time, and puts humanity as a global species at the story's centre. However, critics argue that this science-based narrative conceals ethical and political aspects of the planetary crisis necessary for dealing with it fairly and effectively. Instead, they emphasise things such as past negligence of early warnings, deliberate prioritisations, capitalism, colonialism and the uneven distribution of power and influence throughout history. Besides, despite growing consensus, the definition and time of entry into the Anthropocene are still debated. More critically, there are divides regarding the message of the Anthropocene story that feeds into the decades-old debate regarding system-immanent solutions – i.e., ecological modernisation – versus system change. For example, it can be interpreted both as a lesson of humility and vulnerability and about human exceptionalism and power (Bonneuil, 2015; Fagan, 2023; Fressoz, 2015; Gattey, 2021; Hamilton, 2017; Lövbrand et al., 2015; Simon, 2020).

Research within ESE has shown that many young people find it difficult, or impossible, to do anything to avoid environmental collapse, which can lead to despondency, apathy, and "eco-anxiety" (Kramming, 2017; Ojala, 2012, 2017; Pihkala, 2020). This sense of despair is often compounded by feelings of betrayal and neglect, especially in response to perceived governmental inaction (Hickman et al., 2021). Nonetheless, while the research is limited, studies indicate that students tend to focus on individual solutions – i.e., eco-friendly behaviour – rather than civic engagement and politics (Corner et al., 2015; Kramming, 2017, p. 167).

Several proposals about approaches to history teaching in the Anthropocene have been made, sometimes directly aimed towards encouraging engagement. Referring to the ideas of Barton and Levstik (2004), Waldron suggests a critical enquiry-based, multi-perspectival approach which, among other things, aims to deconstruct dominating narratives of progress and human mastery over nature, deals with historical responsibility and justice, and encourages commitment for change. She argues that teaching should actively counter defeatism by showing that "the future is still unwritten", offering alternative visions, and making a case for the importance of people's historical agency (Waldron, 2021). Similar ideas are advocated by McGregor et al. (2021). The latter also suggests that inquiries based on Seixas's framework for historical thinking (Seixas & Morton, 2013) are suitable for addressing the complexity of Anthropocene history and its ethical dimension.

However, the Anthropocene complicates attempts to engage with questions about agency, causality, and ethics relative to the environmental crisis. Environmental humanities research typically warns against the anthropocentrism of disciplinary history in favour of perspectives that include non-human agency and ethics (Emmett & Nye, 2017). Chakrabarty (2009, 2018) has famously stated that issues like climate change must be addressed from an approach that simultaneously considers processes on a planetary scale and the scale of modern history. Nordgren (2023) and Retz (2022) describe this as a challenging but critical aspect of teaching and narrating Anthropocene history. For example, as Retz points out, history education must handle that, depending on scale, humans are both a differentiated subject, exercising power in a sense traditionally examined by historians, and the unintentional cumulative planetary force of the sciences. This calls for approaches that integrate the "long story" and the "short story" of the Anthropocene, as Nordgren argues. Respectively, these authors point to Shemilt's (2000) and Hughes-Warrington's (2021) ideas on moving between scales and alternate narratives. Recently, Hawkey (2023) has also advocated such an approach.

Theoretical framework and methodology

The theory of historical consciousness has become an increasingly important theoretical paradigm for understanding meaning-making processes in history and the role of history education. Here, Jörn Rüsen's (2004, 2005, 2017) theory of narrative competence offers a tool for comprehending how students construct narratives to make sense of phenomena like climate change and how school history can advance this process.

In this article, we depart from his framework and its anthropological assumptions that we narrate our understanding of the past, the present and the future in order to make sense and meaning of the world around us and our place within society. This foundation does not imply that every individual holds a definitive or ultimate story that is cohesive with beginning, plots, and endings – on the contrary – these stories can be fragmentary and unfinished (compare Carr, 2001). Also, these narratives follow certain templates where collective memories are shaped in a complex socio-cultural interaction through society and its institutions, such as school (Lévesque et al., 2012; Wertsch, 2008).

Rüsen's (2004) framework focuses on three distinct, but interwoven characteristics of the process of narration: experiencing, interpreting, and orienting, often triggered by questions we pose as we face new situations or challenges. As history is all around us, we have both concrete and more abstract experiences to lean against, e.g., experiences from talking about the past with our grandparents or encountering past events in history class. In most cases, these experiences emanate from the life-world (Schutz & Luckmann, 1973), where our knowledge is interwoven with questions of identity and emotions that continuously form, and are formed, by our individual experiences. In turn, our previous experiences and knowledge are used to interpret what is being perceived in order to answer our questions. Our individual interpretations form representations that signify new understandings, which guide our actions in relation to the perceived situation. In other words, experiencing and interpreting societal phenomena provides the individual with new orientations on how to act and engage with the future. This repeating process is a natural part of our existence as we struggle to make meaningful narratives, and thus storify the social world when we express our understandings through communication. Consequently, the life-world becomes the foundation for students' perceptions and experiences as questions emanate from it.

However, processes in people's minds are not linear – we do not go from experience to interpretation to orientation and back to experiences – but rather go back and forth continuously as we build meaningful narratives to understand the world. It is therefore somewhat of a paradox to use Rüsen's framework as a model of the mental process of narration (cf. Johansson & Sandahl, 2023). Here, we use the steps of the narrative process as an analytical tool by separating them. This suggests that episodes of thinking can be described by concentrating on the components of experiencing, interpreting, and orienting. Although the staging will invite students to incorporate all three components simultaneously, we argue that focusing on certain aspects at a time is possible. Assuming that narrative competence may be analytically split into these components while considering its iterative power, we organise our study around this premise.

In Rüsen's (2005) theoretical framework, the life-world perspectives can be advanced by providing concepts, tools, and practises emanating from the discipline of history. In history education, such aspects have been described as historical thinking or first- and second-order concepts (Lee, 2005; Lévesque & Clark, 2018; Seixas & Morton, 2013). First-order concepts correspond to subject matter and the concepts linked to different content areas, while second-order concepts are the procedural ways that historians use to organise and interpret history. Seixas describes six procedural concepts: significance, cause-consequence, evidence, continuity-change, perspective-taking, and the ethical dimension (Seixas & Morton, 2013). In relation to narrative competence, scholarly perspectives can bring in new experiences with content and new, more powerful ways to interpret phenomena in order to advance students' narrative competence about the issue being engaged with in history education.

For the purpose of capturing students' narratives in our study, an elicitation task was constructed and answered by 67 volunteer students. An elicitation task, in this case a construction task, can be useful to get students to discuss topics they are not familiar with. Focusing on something external, such as visual, verbal, or written stimuli, allows participants to express their ideas and understanding of a particular phenomenon (Barton, 2015). In our case, students were asked three open-ended questions concerning how history might aid our sense of the present-day situation with accelerating environmental pressure, climate change, and biodiversity loss. This was done in the context of the following statement:

> We live in an era characterised by rapid global warming and the number of species becoming extinct or threatened. Both the average temperature and the loss of species are today at a level that exceeds the normal during man's time on Earth. Regarding the climate, the UN Climate Panel (IPCC) says that humans cause the current change and that we need to implement extensive measures in the next few years to stop it.

The questions were formulated as 1) How did we end here? 2) What do you think this situation will lead to in the future? 3) What are your thoughts on our possibilities to handle the problems it entails; will we succeed? Note that while this article describes this situation in terms of the global environmental crisis or the Anthropocene, such wording was avoided in the instructions.

The students were instructed to use their historical knowledge during the task. Moreover, to stimulate more precise arguments, they were presented with diagrams illustrating the loss of biodiversity and temperature changes from about 100 BC to 2015. An illustration from Steffen et al. (2015) showing the trends of the "great acceleration" was also handed to 27 of them (see Figure 1 below). This was done to allow an analysis of how this source affected the students' accounts.

Figure 1
One of the graphs used to elicitate students' answers
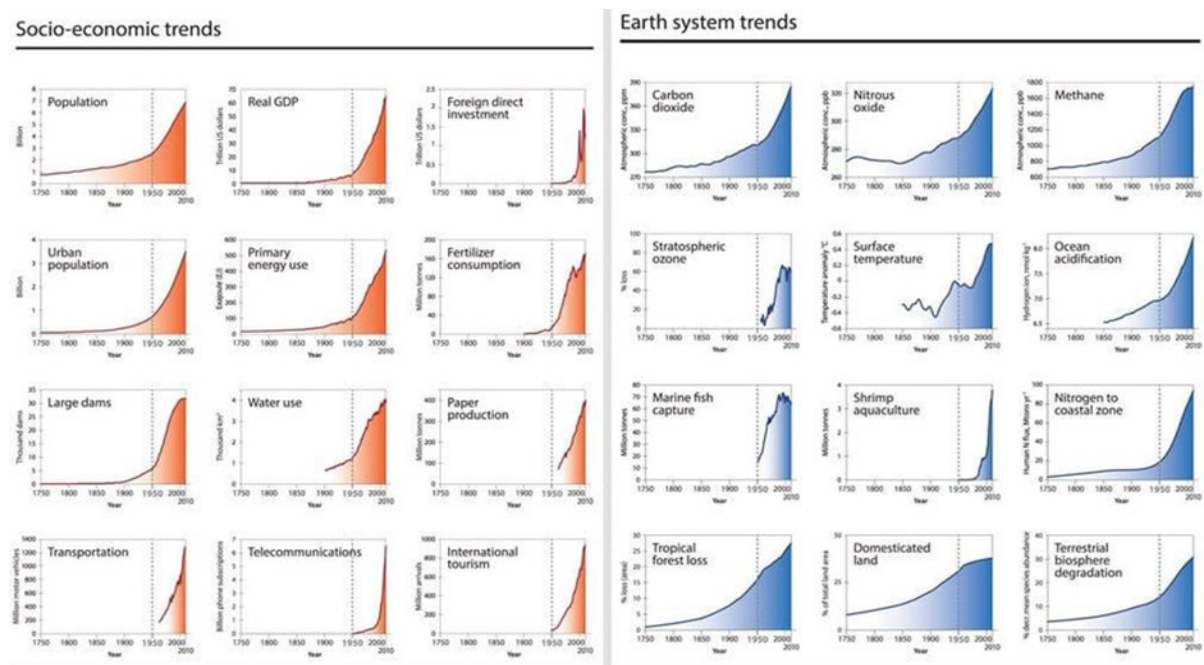
Note. The great acceleration (Steffen et al., 2015) shows the correlation between socioeconomic and Earth system trends in the modern period, highlighting the rapid changes since about 1950.

The participants were students from two upper secondary schools, having completed the common history course or were about to do so. Before the elicitation task, they had not received any teaching specifically designed to prepare them, i.e., teaching focused on environmental history. Of the 67 students, 43 attended the natural science program and 24 the social science program. The distribution between female and male students was 38/29, and they came from diverse socioeconomic and ethnic backgrounds. Our ambition was not to make universal assertions but to present illustrative examples of students' narrative process, thereby helping to discern how it might be advanced through history teaching. Therefore, the selection was not aimed at achieving statistical representativeness, but some heterogeneity was desired to promote a greater variety of responses.

Results

Students' experiences and interpretations of the environmental crisis

A central aim of the study was to investigate how students experienced and interpreted the past relative to the environmental issues exemplified. In other words, whether they had historical content knowledge that they perceived as meaningful in this context and how it earned this status through processes of interpretation. While some students did not suggest any explicit historical explanation, most historicised the current situation with different levels of detail and complexity. Students generally struggled to elaborate their arguments, and their suggestions often appeared speculative rather than grounded in historical knowledge or evidence.

The historical experiences students demonstrated in their answers were, not surprisingly, events in the modern era, and their narratives were intensely coloured by one specific event: the Industrial Revolution. Only two students dug deeper into the past, by contextualising industrialisation within a deeper trend of increasing resource consumption that they traced to the Neolithic Revolution. With its illustrations of rapid modern changes, the elicitation task most likely contributed to this temporal focus. However, the narratives and overall answers of students not presented with the great acceleration graphs did not deviate significantly from those who were.

Notably, while most students traced the emergence of the environmental crisis to modernisation, few engaged with the cultural dimension of this process. For instance, none touched upon ideas of modernity itself. Although some students mentioned the consumerism, economic liberalism and drive for progress and growth of modern capitalist societies, their historical explanations typically lacked cultural perspectives.

Students' interpretations were mainly based on what historians would define as causation, or in Seixas' version: cause and consequence. In our findings on students' specific narratives, we will focus on their causal analysis but, in some cases, on their use of other second-order thinking concepts. The vast majority of students viewed the breakthrough of industrialised production during the nineteenth century as the primary historical cause for the current environmental situation. When they mentioned other historical content, it was, in most cases, linked to the process and effects of historical industrialisation directly or indirectly. One example of both a direct and indirect linkage to the Industrial Revolution can be seen in the following excerpt, where the students mention Columbus's arrival in the Americas:

> But I think the main reason [for our present situation] was the Industrial Revolution because it created more swift and advanced means of transport and economic growth. Economic growth had a certain importance in increasing demand for goods. That meant that people had more money to buy goods and could transport them from different continents (long-haul transports also occurred from North America to Europe). This would not have been possible without Columbus' travels. (17)

Columbus' travels, or the following exchange, is not the central argument for this student but rather a way to connect the Industrial Revolution to prior events. Historical references like this were relatively common, but they were usually used to argue for the Industrial Revolution as the starting point and primary cause of the global environmental crisis. In turn, these experiences became important for the interpretations that students made in their narratives. The typical account can be described as a familiar basic narrative where industrialisation made mass production and mass consumption possible by rationalisation and the use of fossil energy, generating continuous emissions, pollution, and overexploitation of the planet. This indicates an interpretation of historical cause and consequence that was fairly direct and materialistic. This observation corresponds with the linear causal explanations described in previous research on students' historical thinking. Consequently, the path leading to the current predicament generally appeared straight, making the emergence of the crisis seem inevitable. However, in many cases, students' answers displayed a high level of complexity but in line with a basic and straightforward causality. The following excerpt exemplifies one of the most complex but still rather typical accounts:

> A historical event that contributed to the increase in the Earth's average temperature and to the loss of many species was the Industrial Revolution at the end of the 18th century. That's because numerous factories were built for mass production using new machines. These were not environmentally friendly, partly due to a lack of knowledge about how they affected the environment and because rules and laws for this did not exist at the time. The revolution led society to move from an agricultural society to an industrial society, where mass production began, and environmental impact was not a discussed topic. This led to a large amount of CO2, and other greenhouse gases being released into the atmosphere in a short period of time. (4)

This student continued reasoning about this causality, how it escalated in the later stages of Western industrialisation, and how a growing population made things worse. These kinds of arguments, where students linked industrialisation to globalisation and population growth (one or both) by describing them as phenomena that reinforced industrialisation's adverse environmental effects, were common. Some students also highlighted the importance of specific environmentally harmful innovations, primarily fossil-powered transportation.

Students' historical accounts rarely considered human agency and politics. When they did, it was mainly implicit and not substantiated with references to specific historical content knowledge. A few students sweepingly referred to the historical significance of powerful politicians and corporations – i.e., personalising historical events – or considered the role of inventors and scientists. A few students also drew connections between the environmental crisis and past conflicts and power struggles – e.g., the Cold War – arguing that they had diverted humanity's focus from environmental and sustainability issues or that modern wars and weaponry have contributed to global warming and the extinction of species. Again, while some of these propositions may be viable, they were usually made without supporting historical examples and more of a motif for agency, rather than agency itself.

In some instances, students claimed that the environmental crisis was motored by greed, hunger for power or the pursuit of ever-greater wealth. This was generally done in a way that treated these traits as part of human nature. Still, others historicised such motives. Some argued that structural conditions associated with industrialisation, like capitalism, have led to an ego-driven culture centred around consumption and material wealth that neglects environmental concerns. One student suggested the significance of the psychological effects of scientific and technological progress at the brink of the nineteenth century and onwards:

> I think inventors and scientists became addicted to making these inventions and discoveries because of the results they got. It was a new type of success not seen before, and this blinded them to the [negative] consequences. That's how I believe we ended up in this situation. Even today, we humans are addicted to

> constantly outdoing each other and coming up with new inventions without a clear understanding of the consequences that very clearly follow these inventions. The biggest event that gave humanity a small idea of what we are capable of with machines and these discoveries, I think, was when electricity was generated or when various nuclear power plants and factories came into being. We never really thought about the significant impact these factories had with their large carbon dioxide emissions (44).

Students gave some examples of historical perspective taking, typically arguing that people in the past lacked the knowledge that we have today. As we shall return to, this prominently shaped their narrative process. The two extracts above exemplify how many students claimed that people were unaware that their actions or technology harmed the environment or, at least, underestimated these effects. The first extract also shows how the student complements this idea by further contextualising the practice of harmful manufacturing techniques, adding that there were no legal restrictions against it at the time. On the other hand, some students stressed that environmental issues had been neglected or under-prioritised in the past, implicating that, at least in some contexts, people were aware but put their priorities elsewhere. One explicitly claimed that " scientists have been warning about temperature increases since the 20th century. If we had taken the problem seriously, we would not be in the situation we are in today" (27). In this sense, several students expressed that it is essential to consider the agency of past humans, their conflicts of interest and political decisions to make sense of the environmental crisis. Still, students' historical accounts generally did not address human agency, and events just "played out".

In summary, students' experiences and interpretations of the environmental crisis can typically be described as a linear story of historical industrialisation motored by the hunger for progression and ever-greater wealth and facilitated by ignorance, where each historical event contributed to a deepening of the problems. It was told with little details or reference to evidence and in a way that often seemed unsupported by disciplinary or civic historical thinking. In the final section, we will return to how teaching may expand students' experiences and advance their interpretations in relation to the task of historicising the environmental crisis.

Students' orientations towards the present and the future

In line with Rüsen's (2004, 2017) notion of narrativity, narratives are not complete without some sort of supposition, i.e., an orientation towards understanding the issue at hand. The elicitation task asked students to predict the consequences of continuous global warming and biodiversity loss and the prospect of handling it, which was our way of stimulating orienting answers. The analysis focused on the students' projections, their identification of opportunities and obstacles, and their level of optimism and pessimism. Moreover, specific attention was paid to the nature of solutions and engagement envisioned by the students. Naturally, this was done while considering how they experienced and interpreted the past.

In students' answers, there were often apparent links between how they historicised the situation and how they viewed the present and the future, making their reasoning coherent; aspects described as historically significant were also described as significant today. For instance, students who historicised the crisis by referring to past conflicts or greed could later state that people must make peace and overcome their selfishness to solve the present situation. Additionally, some students explicitly presented historical arguments to support their views. One prominent example was a student who discussed Alfred Nobel's efforts to stop wars as he saw the consequences of his invention. This historical example became important in this particular student's orientation:

> All decisions, all wars and all developments that we humans make influence where we are today and where we are heading. However, there are people who think of others besides themselves and attempt to make up for mistakes, and this gives me hope [...]. After all, we humans have created nuclear weapons that can destroy countries in seconds, and we have managed to travel to space, so why

should we not be able to stop climate change, CO2 emissions, etc. [...] If selfish rich people are willing to improve the world and not be so obsessed with their wealth, it can be a better place. Then all countries can cooperate and find common solutions to, for example, make electric cars cheaper and use other stuff (sources) to produce energy, and we can collectively make the world a better place (67).

However, regarding the future consequences of global warming and species extinction, we found no examples where students' assessments seemed influenced by historical experiences. Instead, they sometimes invoked other experiences, such as encounters with media reports, both regarding the risks associated with these issues and their general argumentation.

Students' orientations towards the future were rather heterogeneous, but most shared some general positions. Most evident, all agreed that global warming and biodiversity loss were alarming and would cause severe future consequences if they continued. Their predictions ranged from severe species loss and generally harsher human conditions to the extinction of most species, including humanity. Few specified a timeline for these predictions, but it is noteworthy that none explicitly discussed a future more distant than a few generations ahead. Despite these scenarios, most students were relatively optimistic about a brighter future. They expressed that it was possible to turn the negative trends, primarily putting their hope in non-fossil technologies like solar energy and electric cars. Several stated that, unlike people in the past, people today know how we affect the planet and have the scientific and technological knowledge to opt for a more sustainable future. One student wrote:

With the help of innovative, environmentally friendly technology and conversion to sustainable energy sources, it is possible to counteract climate change. This way, we can continue developing our technological society without affecting the environment. The increased environmental awareness means that people choose organic and natural products and thus contribute to a better climate (31).

However, several students claimed that the problems had grown too severe to handle or that the necessary changes would not take place. Many articulated that technological development is not enough to solve the situation. These students generally argued that lifestyle changes perceived as sacrifices would be necessary, and some voiced system criticism and a need for more radical change. In this line of reasoning, the main obstacle was that people tend to prioritise personal wealth and comfort. This generally appeared as a common human trait or cultural predisposition, but some students particularly pointed out the greed of companies, states or politicians. Here, students were mainly occupied with actors rather than structures. However, some students directly considered structural barriers, for instance, by arguing that economics and fear of public reactions sometimes prevent politicians and industries from taking adequate actions.

There was no absolute correlation between how the students narrated the situation and if they believed it would be managed, and not everyone took a clear position on this. However, in general, students who primarily described it as an issue of technological capacity and awareness were more optimistic than those who mentioned structures. The student above (31) is a rather typical example of the technical optimist. The following excerpt shows a more pessimistic orientation (but not without hope). This student claimed that for a long time, people did not know that carbon dioxide emissions caused global warming, but when this was established by science, that did not affect our emissions. She later argued:

I think we have a good chance of solving these problems as it is still not too late to redo and do it right. However, I don't think we'll really try until it's too late. I think that's because these companies make too much money from it. The same applies to us consumers. We have created a lifestyle with many habits that require these companies to continue producing goods/services. We, consumers, are unwilling to let go of the simplified everyday life with all these pleasures we have created for ourselves. It is very selfish, but we humans have it in our nature to let lust take over consciousness regardless of the consequences we are very

> aware of. The solution is to stop emitting carbon dioxide and stop destroying nature, which is a resource for these factories, for example. But I don't think that will stop, as I said, as the economy would collapse if there were no goods/services to sell; thus, almost the whole world would lose their jobs (44).

These two examples also illustrate how students' interpretations of what people in the past knew – taking historical perspectives – also shaped their individual orientations. While the first student suggests that increased environmental awareness will make a difference, the second argues that the problems have been known long enough to disprove this. This conclusion leads her to search for explanations, and she finds that human greed and the functioning of the economic system provide an answer.

Even though these two excerpts represent somewhat different orientations, both students shared some rather typical views. For example, both pieces exemplify how the students generally emphasised that ordinary people can contribute through lifestyle changes and as conscious consumers, instead of discussing the prospect of, for instance, collective political engagement. While many expressed that the ultimate power over the situation lay in the hands of the industry and policymakers, few seemed to consider or believe in ways of directly influencing these actors or people in general. Although the student above (44) represents a more system-critical perspective, the student does not discuss collective political action or engagement. That is, students struggle to identify or believe in civic strategies or alternatives outside their perception of the current system. We are doomed since we are what we are:

> When it comes to climate change, not much can be done about it because we are consumers and cannot stop ourselves from increasing in number or consuming, and it is not possible to stop companies (8).

Students were generally preoccupied with this view of humans as consumers, which reflects how they historicised the crisis. This may also have contributed to the fact that the ethical dimension of the past was typically absent in their reasoning. While the task did not explicitly encourage the students to consider this, it is noteworthy that none discussed historical accountability, and few engaged with ideas of differentiated capacity and responsibility to bring about necessary changes. Instead, it was common to argue that the situation demands global cooperation and the efforts of politicians, individuals, and enterprises alike. However, several stressed that the prospect of a brighter future now depends on a few large countries, like China, India and the USA, due to their massive populations and production. This view was sometimes accompanied by the idea that the actions of others were insignificant. In this sense, politics also focused on actors rather than structures.

Conclusions and discussion

In this article, we explored upper-secondary students' historical consciousness concerning the global environmental crisis in terms of narrative competence. The results indicate that many students have explicit but limited historical experiences that inform their efforts to make sense of the situation. In this case, these experiences concerned modern events and processes, typically focusing on historical industrialisation and the emergence and expansion of techniques and activities directly associated with climate change and biodiversity loss. They also drew on history to explain the driving forces behind this ongoing process and why it has been allowed to proceed. Moreover, a few students invoked historical experiences to illustrate lessons learned about human or technological potential. Despite the instructions, history often played a relatively marginalised role in students' responses. Instead, many were characterised by common-sense reasoning or primarily informed by experiences within other areas of knowledge, such as media and public debate.

Students' historical experiences were interpreted by reasoning about *causes and consequences*, taking the *historical perspectives* of people in the past, and, in a few instances, using sources. This was generally unelaborated, and students' explanations typically focused on basic aspects of technology, economics, lifestyle and demographics. Many did not go beyond pointing out mechanistic connections between the rise of industrial production or mass consumption and environmental degradation. Although several students presented more complex historical explanations that required a broader set of substantial knowledge and procedures, they generally remained within this focus.

Students' orientation towards the future varied between hopefulness and despair but were somewhat leaning towards optimism, despite being troubled about the future. Their historical experiencing and interpreting usually aligned with their reasoning about the prospect of handling the crisis and were sometimes part of it. However, none drew on history to predict the consequences of the current predicament, and other experiences generally played a more explicit role. Nevertheless, a few narrative aspects seemed to shape students' orientations prominently. In many cases, the narrative of technological and scientific progression, and the belief that people in the past lacked better alternatives, gave them hope that technology and human ingenuity would help us. Students' perceptions of past people's perspectives on their environmental impact also seemed to influence their orientations distinctively. Perceiving people in the past as ignorant or unaware contributed to optimism. On the other hand, viewing them as informed or inherently selfish contributed to pessimism. In other words, students recognised the need for change to save the future, and perceiving the present conditions as different from the past was associated with a more hopeful orientation.

Students' orientation towards action primarily centred on people's potential contributions in terms of lifestyle changes and conscious consumption rather than civic engagement. Moreover, they did not seem to believe in the prospect of fundamental societal transformation. This reflects the typical historical narrative that lacked political causes, alternative perspectives and civic agency and where people appeared primarily as a growing global collective of consumers. Students' historical accounts did not cover political processes or decisions, and to the extent that politics was mentioned, it appeared distant from ordinary people.

Our analysis of student causal explanations aligns with patterns identified by previous research on historical thinking. Students tended to narrate the environmental crisis in simplified ways, without accounting for the complex interplay of causes and their differing nature. In this case, few students personalised historical change. Instead, many explanations were linear and materialistic, making the crisis seem inevitable. Moreover, they often appeared speculative, especially when diverging from the typical storyline.

Previous research has shown that students' historical accounts often rely on familiar narrative structures and their understanding of human nature, especially when lacking adequate knowledge of past events (Barton & Levstik, 2004; Lévesque et al., 2012; Wertsch, 2008). In this case, this appears to be a likely element of many answers. Likewise, the somewhat unexpected centrality of modern wars and conflicts in several students' narratives may be explained by their prominence in school history, making it natural for students to seek connections between them and current issues.

Students' narratives were inclined towards some predominant forms. These, we suggest, reflect common narrative templates among students. Most noteworthy, they typically centred around elements recognisable from the dominant Anthropocene narrative – or variants thereof – described by EH scholars (Bonneuil, 2015; Fressoz, 2015; Lövbrand et al., 2015; Simon, 2020). This is a narrative that says that: 1. humanity at the species level created the crisis through 2. the rise and expansion of fossil-based industrialisation, in synergy with globalisation, population growth and economic development, 3. thanks to science, humanity is now environmentally conscious, 4. this awakening creates an imperative for joint global action, 5. leaders now have to let scientists guide transformation, typically focusing on technological solutions and market incentives. However, this does not imply that students' narratives typically contained all these elements. Nor does it exclude that several answers shared elements with narratives described as

alternative. Clearly, this was the case regarding students who challenged the progressivist belief in the novelty of environmental awareness and technological solutions. In addition, students' narratives lacked the deep time setting of the Anthropocene.

As noted, there is a common scholarly critique that the standard narrative is based on a "post-social", "post-political" ontology that works against public mobilisation (Lövbrand et al., 2015). Moreover, according to Bonneuil (2015) the dominating way of narrating the past, present and future of the environmental crisis does not consider bottom-up initiatives or the struggle of the environmental movements, describing society as passive and in need of guidance. From the perspective of action-oriented history education, this is noteworthy, as references to such experiences were also absent in students' answers and students typically did not recognise how people like themselves could take action beyond their role as consumers. Here, our finding mostly aligns with those of Kramming (2017), who also identifies a connection between students' perception of their insignificance and feelings of despair. In this sense, the standard narrative stresses the need for action but offers little guidance to students seeking practical ways to do so.

Although it is not surprising that all students do not delve into every angle of an extracurricular research task, our findings suggest history education's potential to advance students' ability to engage with the environmental crisis. As noted, the interpretive dimension of students' narrative process cannot be analysed in isolation from their experiences. Instead, their ability to formulate well-developed historical explanations must be understood as an interplay between their substantive knowledge and analytical skills, i.e., their practical understanding of historical first- and second-order concepts. While a sophisticated explanation presupposes both substance and analytical ability, a less-developed explanation may be due to a lack of either or both. Nevertheless, we believe that the results indicate that many students lacked the basic historical literacy required to formulate meaningful and substantiated accounts. But even those who displayed a more developed capacity would benefit from a broader set of historical experiences in relation to the subject, thereby allowing them to formulate the richer and more nuanced narratives necessary for a more qualified capacity for orientation.

Implications for history teaching

In short, the study suggests that school history may play a vital role by exploring content that enables students to ground and develop their historical narratives on a disciplinary basis, including historical content outside the spectrum of students' typical experiences. Moreover, there is a need for historical experiences that can aid students' construction and assessment of future Anthropocene scenarios. This certainly must imply somewhat interdisciplinary content that challenges the traditional scope and anthropocentrism of history as a subject. However, our results strongly indicate that teachers should not disregard history's traditional disciplinary contributions to learning, such as providing cultural and political context. Not least, it seems wise to include content that helps students reflect on different visions and strategies for engagement. Here, we think several of the suggestions from civic-oriented history educational research are viable but warn against going too far down the trail of normative teaching.

Regarding students' interpretive ability, the results highlight the importance of advancing their capacity to engage with the concepts of cause-consequence and perspective taking but also history's ethical dimension and the importance of deliberating on environmental and sustainability issues (Öhman & Östman, 2019; Seixas & Morton, 2013). The results also indicate that exploring past people's perspectives relative to our own is a powerful way to introduce historical content and engage with questions emanating from students' life-world. Another layer of interpretive depth might also be added by directly exploring the use of history in the environmental debate by pointing out and critically examining competing narratives. In this way, teachers can help students discern how history culture influences how we deal with Anthropocene issues, thereby influencing the future.

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The banal significance of family history research: Experiences and narratives from participants of Swedish non-formal family history courses

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ABSTRACT

Is family history research always life-changing and sensational? Or is there something significant in the banal that the participants in this study reported? This study aims to explore the spectrum of experiences of family history research, focusing specifically on the banal. I argue that it is in examining the banal everyday motivations, experiences, and findings that a greater understanding of how the average individual negotiates and builds meaning through their use of cultural heritage, family history, and the past. The everyday banal is what is reproduced and remains after the effervescence fades away and the normal redundancy in traditional society continues. The banal withstands the sands of time and effectively (re)produces narratives and binary tropes of identity and the past. This study examines the narratives collected from semi-structured interviews with seven participants from two Swedish non-formal courses in family history research. These narratives are important as they reveal participants' engagement with historical consciousness and the relationship between the past, present and future. Moreover, the stories they tell are significant in revealing that participants learn family history research for numerous reasons, including "something to do" alongside those who wish to have a deeper historical understanding. Family history research is a collective and collaborative activity despite the individualised nature of focusing on one's ancestors. Participants' research led to discoveries that were not always revolutionary, reinforcing, for example, banal traits seen in themselves and banal activities they carry out today. This study found that while the reasons for participation, the act of attending class, and participants' research may not necessarily result in the extraordinary–thieves or kings–for these individuals participating in family history research, the banal reasoning and banal results are significant.

KEYWORDS

Family history research, Banality, Narrative, Non-formal education, Historical consciousness

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Introduction

With millions participating across the globe in some form of family history research, one cannot help but wonder if the goal is to fill in a family tree or if there is something more. This study seeks to provide insight into the global phenomenon on a personal scale, examining participants' perspectives of Swedish non-formal courses. How do participants describe their experiences, motivations, learning, and the perceived significance of family history research?

Family historians, while not often professionally trained, are perceived as actively contributing meaningfully to the discipline of History through self-directed learning that motivates and encourages a greater appreciation for the past (Edquist, 2009; Shaw, 2021; Shaw & Donnelly, 2021a, 2021b). As a form of public pedagogy, family history research enables individuals to build contextualisation and develop their historical thinking, empathy, and consciousness (Shaw, 2021; Shaw & Donnelly, 2021a, 2021b). Public pedagogy views everyday informal spaces as inherently educational within the organised social relations of daily life, including popular culture and media (Burdick & Sandlin, 2010). Burdick and Sandlin (2013) identify three streams of public pedagogical research: 1) *transferring knowledge* for emancipation, 2) understanding the *phenomenological relationship* of learning as active and embodied, and 3) *posthumanist rupturing* of self. This research aligns with examining the lived experience and negotiations of individuals of family history research and positions itself in the second stream.

Individuals' frameworks of historical understanding emerge from previous experiences such as films, television, stories, traditions and earlier schooling (Seixas, 1997, p. 22). Attention to a macro-historical context can enhance observing adjacent micro-events and people (Páez et al., 2017). Furthermore, understanding individuals of the past's contributions constructs appreciation and comprehension for actions, attitudes and motivations that persist in present times. Therefore, it is essential not to neglect individuals' interpretations of what is significant. Awareness of one's framework of historical understanding is not always clear. According to Seixas, pedagogy is to expose what is often "partially submersed frameworks for orienting themselves in historical time," as attributed significance reflects historical interpretation and the meaning of history (Seixas, 1997, p. 22). The challenge with historical significance is that there is not one set of unquestionable facts or significant events (Hunt, 2000), but for each individual, culture, and group, there can be multiple that are contextually and temporally dynamic. Examining what individuals and groups deem significant draws awareness and greater comprehension of decision-making, the organisation of the physical and social world and why conflicts exist.

Comprehending the significance of individuals' evaluation of family history research necessitates an inquiry into motivations and contexts as contributing to their framework of historical understanding. Research in family history predominately finds motivations as the pursuit of identity and belonging (Bottero, 2015; Moore & Rosenthal, 2021; Nash, 2008). However, Shaw (2017) found that while her Australian participants incorporated identity, it was not explicitly sought; their findings were used to confirm their previously held conceptions. Shaw found that her participants provided many overlapping reasons for their participation,

categorising these as Prompted, Inherited, Curiosity, History Buffs, and Recreation. Likewise, in Sweden, Börnfors (2001) noted that family historians often connected their motivations to tangible (e.g., photographs) and intangible (e.g., stories) inheritances that led to a sense of belonging and cultural embeddedness (identity). This reflects the portrayal of family history as a move of interest from the traditional disciplinary focus of notable events and famous individuals (e.g., wars and royalty) towards the banal, unremarkable or commonplace, embedded symbols and objects of historical narratives (Billig, 1995; Edquist, 2009; Karlsson, 2011; Nordgren, 2021; Shaw, 2021). Similarly, researchers found that motivation and reasoning can be related to one's lifespan and a desire to produce a legacy for future generations (Evans, 2023; Moore & Rosenthal, 2021). While others cite intellectual, spiritual, social and travel aspects as incentives (Moore & Rosenthal, 2021).

Compared to other family history experiences, such as ancestry tourism or genetic testing, attending a course may appear banal or non-consequential. However, researchers have shown that examining the banal can illuminate the context of sociocultural and historical complexities and influences. In this study, I explore how Swedish participants describe their involvement in family history research, who it is for, and what is significant for their understanding and conceptualisation of the past.

Theoretical approach

Historical consciousness and narrative

Examining participants' interactions and descriptions of their family history research involves assessing their awareness and interactions with presentations of the past. Historical consciousness is a culturally manifested process of becoming aware of the past through a dynamic present-day lens of understanding from individual and collective perspectives (Gadamer, 2004; Grever & Adriaansen, 2019). Participants' reflections are an engagement of the horizons of their experiences and knowledge with the (re)presentation of the past (Gadamer, 2004). This approach to the concept recognises that individuals carry with them previous historical knowledge and consciousness and insinuates a *negotiation* of this with new information and insights (not necessarily always leading to development)(c.f. Sexias, 2005). People are seen as dynamic rather than as a "blank slate" (*tabula rasa*), rejecting "strict relativism" and eschewing earlier ideas of history as a collection of "facts" and accepting a variety of legitimate histories(Körber, 2016, p. 441).

Historical consciousness is often connected to historical thinking in research and assessed through "competence models" (Körber, 2015) from a cognitive developmental standpoint (Popa, 2022). Others, such as Nordgren (2019) and Popa (2022), criticise this approach for the absence of relationships and recognition of its influence and negotiations between people, cultural objects, contexts and sociocultural communities. They prefer a hermeneutic approach examining meaning-making "that encompasses a vast, rich and ambiguous array of ways in which people and societies situate themselves in time and represent their past to themselves and others" (Popa, 2022, p. 173). This view of historical consciousness as meaning-making within a cultural complexity is what the current study applies.

Nordgren claims historical consciousness reveals "tensions and contradictions within and across historical cultures where the line between facts and myth, the unique and the exemplary, the distanced and the moral is crossed" (Nordgren, 2019, p. 781). This reflection on the past is expressed in narratives that individuals and collective groups apply, contributing to and influenced by contemporary historical culture (Aronsson, 2004; Karlsson, 2014; Thorp, 2020). Historical culture is all representations of the past and the institutions/organisations that present/teach and govern them in the present (Nordgren, 2016; Rüsen, 2005; Thorp, 2020).

Narratives are dynamic cultural carriers or tools (Barton & Levstik, 2004) "endlessly transformed by human beings to inform the next generation of universal 'truths' of what it is to

be human but within a vehicle that is continually culturally crafted to fit the listener" (Jarvis, 2019, p. 6). In creating narratives to suit their present context, individuals make sense of sequences of events and gain meaning and purpose by connecting themselves to a larger collective (Barton & Levstik, 2004; Karlsson, 2014). Historical consciousness guides and impacts these narratives as individuals engage with the relations between the past, present, and future (Nordgren, 2016). The stories we tell about ourselves and our families are purposeful and adjust over time, affected by culturally/temporally changing accepted behaviours and norms. They are significant to individuals' ability to explain, understand and position themselves within a cultural society.

While an effective tool, the danger lies in mistaking narrative as history itself, forgetting that narrative is selective and represents one of many ways to make sense of the past (Barton & Levstik, 2004). Narratives are powerful and can cause alternatives to appear illegitimate and reinforce problematic tropes and binaries, such as the primitive past/modern present and moral past/immoral present. These presentations and their newly acquired experiences and knowledge through family history research affect participants' perceptions and evaluations of the past.

Historical significance

While motivation connects to purpose and a future goal, significance is not linked to one temporality but can find significance in the past, present, and future. Significance is the attribution of inherent value or an evaluation of the value of something/one made by individuals (Martela & Steger, 2016). Martela and Steger (2016) argue that meaning-making is a reflective activity that develops mental connections between experiences, knowledge, things, and relationships (people). Individuals' relationship with the past, what they perceive as relevant and meaningful, and their communication can represent their interpretation and construction of history (Thorp, 2016). This interpretation and construction of the past is also used for identity positioning and provides perspective for the future (de Saint-Laurent & Obradović, 2019).

Historical significance involves acknowledging certain events and individuals in the past and the perceived consequences of their actions. Numerous factors contribute to the perception of historical significance, such as the tendency for local orientation (e.g.national heroes/villains in textbooks), temporal nearness, and general norms and structures existing within a social context (Páez et al., 2017). Emotionally charged ingroup collective memories, reinforced through rituals and institutions, contribute to perceived significance (Páez et al., 2017). While memories fade and details are lost, the understanding derived from conclusions of the significance of events/people constitutes educational value (Hunt 2000). In various forms and countries, the so-called' history wars' (Samuelsson, 2017) reveal the contention that can occur when questioning the value of earlier epochs in curricula. Perceptions of events and individuals change over time due to sociocultural contexts and access to information. While criteria scales exist, I focus on the individuals' descriptions of what they deem significant and reflect what Peck and Seixas (2008) have condensed into two criteria: resulting in change/consequences and revealing or illuminating enduring/emerging issues.

Research design

In the spring of 2022 (Jan-June), I participated in two adult non-formal education courses offered by a study association and a local family history society in the southern region of Sweden. The study association provided an online course utilising the web platform Teams, comprising six (n=6) participants. The family history society met in person in a historic locale within a medium-sized city. It had eight (n=8) participants. Participants in both courses ranged between their early 20s and their late 70s. The courses were six sessions each; however, the in-person course continued as a study circle for a few weeks afterwards. The course leaders were not professionals but had extensive experience as family historians and were perceived as "experts" by the participants. As non-formal courses, there are no grades or prerequisites, and organisers limit the

number of participants (max 8 in-person, max 9 online). The online course was less structured and open for collaborative learning–participants were encouraged to lead sessions. Questioning the course leader's correctness was regular and perceived as non-provocative. The in-person class did not know each other's names and had a course leader with a more traditional approach, often sharing historical anecdotes and procedural knowledge in a one-way monologue. In this article, I focus on the individual participant's narratives.

Those individuals who consented participated in an audio-recorded semi-structured interview after the course completion, held online, over the telephone, and in person. While this is a small sample study, the age and dominance of female participation demographics reflect the comprehensive statistics of Study Associations in Sweden (Statistikdatabasen [SCB], 2023). Seven (n=7) females participated in this study, and the interviews were 40 minutes long on average and transcribed verbatim. Questions posed included, "Why did you take this class?" "How did you become interested in family history?" "Describe something that you learned/surprised you." Participants spoke freely, and the atmosphere was informal. Participants were informed of their rights to withdraw and, in the text, were de-identified using pseudonyms and removing identifying features. In the initial familiarisation and coding phases of reflexive thematic analysis, I identified several reoccurring patterns for analysis (Braun & Clarke, 2006, 2022). These I clustered for broader patterns, generating initial themes including motivations, desired results, interest in the past, frames of identity, the relevance of place, and learning environments. I reviewed, redefined, and renamed themes multiple times. Themes are patterns anchored in shared meaning, not passively emerging, but chosen by the researcher to provide a rich, in-depth understanding (Braun & Clarke, 2022). I have chosen to organise the findings under the headings: Reasoning for family history research, Learning looking back-going forwards, and Significant knowledge.

This study is part of a larger research project that has sought and received approval from the Swedish Ethical Review Authority https://etikprovningsmyndigheten.se/ #Dnr 2019-05944.

Findings and discussion

The reasoning for family history research

Participants describe many reasons for taking the course and participating in family history research. Participants' motivations for their interest in family history and attending the course are generally similar to categories found by Shaw (2020) and Börnfors (2001). Most participants relate to the categories of History buffs, Prompted (by event, loss, objects), or Inherited (someone else in their family started, and it was something that they just "did"). Others relate more to the more banal categories of Curiosity and Recreation, as demonstrated by Elyse, who says, "to meet others who do family history."

The majority of participants' narratives reveal a combination of these reasonings. Several participants note that the course was about creating a sense of accountability. As the participant Elyse states, "I wanted to deepen [my knowledge] a little bit more and get a kick in the ass too, to get going again" after falling into a slump. This sentiment of the course serving the purpose of an accountability partner is echoed by several participants. Edda notes, "This is my third course, and I took it [because] I don't get anything done if I don't take a course." Noomi also states, "Yes [the course] contributed one hundred per cent. I wouldn't have gotten started myself, if I hadn't taken the course, I wouldn't have been able to [do it]." Many note the simplicity of having something to do in bad weather, as more than half of the participants emphasise the impact of annual seasons. Alice says, "It's a nice occupation, preferably in winter," while one participant Maj explains her husband signed her up for the course because "he thought I should have something to do while he plays golf". Reiterating that while for some doing family history is a passion for learning about the past, for others, it simply is a banal, regular activity to keep them occupied.

Despite this banal reasoning, most participants describe their interest in family history as connected to history buffs, prompted, and inherited categories. Therefore, it can be deduced that while some participated for banal purposes, they chose to participate in this particular class type due to their interest in family history and the general past. Moreover, it should be noted that while motivations for family history can and are categorised, these categories overlap.

A rite of age: "When I am retired".

Participants repeatedly refer to advanced age and retirement connected to researching family history, as if it were a rite of passage to participate when one becomes "old". This could be explained as the perception of having more free time. Ann initially thought she would "deal with [old letters, photos and stuff] when I'm retired. Then I have plenty of time. Then I must have something to do as well." However, she later questions why she thought this way. "I just figured out why should I wait until I retire? I'm doing it now instead. So, I signed up for this course." One participant, Edda, was contacted by a course leader to help a Swedish-American relative find family in Sweden. Edda says, "I didn't think much of it at the time. I was a little over 30 years old at the time", implying that she was too young to consider family history and underlying that it is an activity for the old. Participants reiterate this belief by explaining why their children are not interested now and "might not be until he turns 50-60" (Ann). Similarly, Maj says her daughter is not interested: "No, it's not hers. No, they have enough wit
h the present." This statement not only implies that interest comes with age but also disassociates family history from the present and future. This division of temporality contrasts with many participants who actively engage with the past, present and future as simultaneously intertwined.

The over-representation of family historians in advanced age is also seen in other studies (Börnfors, 2001; Shaw, 2020). The association with advanced age and family history can be argued as a growing appreciation for life's fragility and brevity, as discussed by Hookoomsing in Eriksen (1996). This realisation of life's brevity can result in the psychological desire to, in some form, continue to exist, leaving a legacy for future generations (Moore & Rosenthal, 2021). Edda reflects that her interest in family history intensified when her parents died, saying she became "nostalgic or hembygdskär" (hometown love) in the realisation of her mortality and heritage that partly disappears with the memory "keepers". Perhaps it is, as Elyse, the youngest of the participants, says, "I think there are different phases in life and that you have different thoughts at different times." As every person's experiences, knowledge and relationships are uniquely theirs (Martela & Steger, 2016), the timing of these phases of life and the attributed significance are also highly personal. Thus, we can question if family history is an interest for those in the later years of their lives or an interest in the past in general. Furthermore, whether this perception of family historians as "older" will be changed over time with the introduction of genetic testing that markets to a broader population. It should also be observed that while most participants assert family history research is a pastime for the "old", this is often in direct contrast to their age and participation–perceiving themselves as exceptions to the "rule".

Learning looking back–going forwards

Edquist (2009) argues that "the family history research boom" (*släktforskningsboomen*) in Sweden is an example of the democratisation of historical culture. This reflects the public pedagogical perspective of learning outside formal education as active and embodied through negotiations of knowledge and experience (Ellsworth, 2005). Family history research is not necessarily a straightforward activity and is more than finding dates, names, and places. It reflects individual choices of what and whom to study and an underlying evaluation of what is significant to them. In Sweden, as in other countries, national, regional, and private archives, family history societies, websites, and companies offer various information and support beyond formal institutions.

Participants in this study attend regularly offered non-formal courses. They learn how to search databases and the order of activities family historians generally use to follow a person through their life (i.e., birth, baptism, where they lived, worked, married, children, and died). Moreover, participants learn to critically assess a source's reliability, the abbreviations, older handwriting and "old Swedish" in church books and other records. Course leaders often provide historical contexts for these sources and individuals and explain why information may be missing.

While many sit alone reading or searching archives, family history is not necessarily a solitary task. Participants in this study demonstrate this by sharing queries and solutions and practising together. Through their research, family historians connect to those who came before them, those who come after them, and those who are working beside them in the present.

Participants of this study often convey inheriting research, similar to the findings by Shaw (2017) and Börnfors (2001). Ann recalls receiving "memories of their upbringing in compendiums from older family members," something she says "gives a little more meat on bones" to create a more compelling and thick description of the factual events she records from the church book registers. Inheritance does not only come from behind or the past but is passed forward. As Moore and Rosenthal (2021) found the motive for leaving a legacy to future generations, participants in this study, despite their children not currently being interested, hope to pass their research on. Edda says, "I promised my kids that I'll document, write little stories around… like little, short stories around all these little trinkets that we have [inherited]." Noomi hopes her children and grandchildren will benefit from her work. She is giving them her research, "so my kids don't have to rummage among it, then they just have to add the ones that are in." Elyse, who does not have children, relays that she, too, has passed on her research in the forms of a family tree for her godson's confirmation and grandmother's 90th birthday. She explains that family history is not just a tree but that she "also tried to write a little bit, some life stories about those that are in the tree so that you still get the context as well." What they choose to include in these cultural inheritances reflects participants' evaluations of what is significant to share and what can be forgotten.

Participants also highlighted the transference of skills and the "how to's" of doing family history. Alice engages her mother, who did not do family history research previously, to participate in her family research. She now follows Alice to the national archives and visits places related to their family. Despite the individualised focus of family history research, participants' actions in this study reflect an interest in collaborative and collective history, including others in their research and doing research unrelated to their family (cf. Edquist, 2009). Participant Ann is teaching a newly retired friend how and where to start family research, and another participant is working with her neighbour on which archives to search. Participants express the benefit of reading and discovering together in class church book registers and the historical context. Therefore, as evidenced by participants' narratives, family history does not only engage those who participate in a course or initiate family history research themselves but, like rings on the water, creates connections and impacts participants' wider social network. The continuation of inheritance in the form of skills and information reveals participants' perception of their family history research as significant and the desire for longevity and relevance (Peck & Seixas, 2008).

Significant Knowledge

What participants learn goes beyond names, dates, and places of people from the past, affecting their understanding of history. Sofia states that she has always enjoyed doing family history research. It makes history "real" and puts her ancestors into a historical context, creating a more complex understanding, "I can put them in Swedish history how it was then… you kind of paint a little bit more, you get a bigger palette, you can see more things and a bigger context. I think [it] is exciting." Likewise, Alice notes that individuals and the present time do not stand alone but are connected within a broader context, stating, "You're not by chance … you're in a context, somehow, and you come from something." Ann explains that if she learned that an ancestor worked at the matchstick factory, she would go to the factory's museum to understand how they made matches

and "what history or stories they have in their registers about those who worked with matches." This example demonstrates participants' connections from family history to other histories, broadening their scope of interest and understanding. Elyse notes how family history is "a lot about putting myself in a historical context…every generation is shaped by the previous one." She explains that gaining this perspective and historical consciousness allows for a greater understanding of how people behave(d) and how past events impact the present.

> Social heritage, I think is strong. You can understand in a different way how grandma has been, for example, based on the fact that she came from a family that was quite tough and was free church and, in a way, a little outside of society, so, in some ways, that, yes, yes and of course, it's shaped my dad's upbringing, and then in turn my upbringing, I think it's a chain in some way. (Elyse)

Noomi demonstrates her development of historical consciousness, contrasting what was acceptable in the past to the present and draws comparisons between immigrants to Sweden today and those who left for America 150 years ago in a reflection of "how we had it then and how we have it today". Noomi observes her change in perspective of her father-in-law's disposition when she learns that his father sold him at auction at age five. This causes her to reflect upon the limitations of sources, noting the "heart-wrenching information that isn't in the church books". This reflects Shaw's (2017, 2020, 2021) and Shaw and Donnelly's (2021a, 2021b) findings of family historians' heightened historical consciousness resulting in greater empathy. What participants relay as relevant and meaningful reflects their understanding of the past and the use of historical consciousness (Thorp, 2016). The emphasis on the consequence of the past on participants' understandings and the impact on the present reiterates Peck and Seixas (2008) categorisation of Result. Thus, accentuating that what family historians deem personally significant can also impact a wider population by increasing empathy and understanding for those less fortunate in society.

Sweden today and yesterday

Connection to Sweden of the past demonstrates more than historical consciousness and empathy for the "new(er) Swedes" of today. Participants' narratives convey a specific image of Sweden and the past, illuminating enduring binaries and the challenges to these, such as the past characterised by a different set of moral guidelines, as seen in the example of selling small children at auction. The past is described as more primitive, plagued by poverty, a place to escape (emigrate away from) to the more modern present, yet simultaneously nostalgic and containing something "golden" that should and is preserved and visited in the present. Alice describes that "they had large crowds of children" in the past. Noomi explains that it is because "there was no safety net… but that they must have the help of their children when they become old." This picture starkly contrasts contemporary Sweden's social welfare model that takes care of its citizens–which participants consider the "norm". This poverty led to forced migration. Sofia recalls that her great-aunt attempted to emigrate to America with a newly divorced man but "could not come in". They were turned away at Ellis Island because someone on the boat said he was married and had no divorce papers as proof. This example, like another participant who mentions their shock in realising there were divorces even 100 years ago, emphasises the perception of morals and what was socially acceptable in the past compared to today. The nostalgic and often politicised view of a traditional nuclear family unit may not be the whole picture of the past.

This conflicting picture of Sweden is also impacted by the participants' described banal interests, such as reading historical novels and watching family history television programmes. The banal findings of participants reinforce the view by providing evidence, such as counting how many spoons there are to inherit. As Noomi describes, "Only 100 years ago there was a lot of poverty in Sweden…you can read the testaments [*bouppteckning*]", noting how little they had, such as "five spoons, four plates." While not 'life-changing', these banal findings reaffirm ideals and binaries held by participants. Makky (2020) points out that activities and things are not created to be banal but *become* banal and are redeemed by examining banalities. Banalities, he

argues, are "small and insignificant things, phenomena, and moments [that] 'co-create- our daily life and the world as we know it", and despite being fundamental and an "immanent part of our experience", these are often overlooked (Makky, 2020, p. 94). Although more "exciting" results exist, such as Ann finding her ancestor's murder reported in a newspaper, "he was beaten to death", it was the findings of "strong entrepreneurial [widowed] women" who took care of the farm that she underscores significant. Ann sees herself as having this characteristic and hopes her daughter will be the same. These banal findings of the past and their remnants in the present make up most participants' accounts, reiterating their felt significance.

Visiting historic Sweden in the present is made possible by local history museums and family history societies. Most participants also recall visiting or planning to visit where their ancestors lived. Elyse describes visiting where her family came from and walking beside banal everyday signage that "flags" the past embedded in the landscape of the present.

> They had done a croft (torp) inventory ... so you walk beside the road [and] there are small signs that here was this croft and here lived these people. ...you also put into a context that, okay, that it was this place.

This signage and local history associations are commonplace in the contemporary Swedish landscape. In their narratives, participants refer to *hembygsföreningar* (local history associations) as places to turn to for help in their family history research . Edda, while also reflecting on the continuation of the landscape of Sweden, points out that her ancestral home still stands in a prominent location in the middle of the town's square. In contrast to the other contestants, she notes that her family did not suffer nor were poor. Instead, Edda reports her disappointment of only finding the banal, "there are no, no special things, [the course leader] told me [I would find] thieves and murderers and all sorts of things, [but] nothing like that I have found."

Historical significance for participants is found not only in the extremes but also in the banal. Participants highlight events and people that they perceive have resulted in consequences and reveal continuations in the present (Peck & Seixas, 2008).

Conclusion

This study presents and discusses the narratives of participants from family history courses. Participants' narratives reveal a complex and nuanced picture of family history as both highly significant for their understanding of self and historical culture but also as a means to satisfy banal desires of "something to do" during the winter or when the husband is playing golf. While the perception of family history as a hobby for those in the twilight years of their lives persists, a broader range of ages are interested in and impacted by family history. This stereotype may evolve with the increasing variety of consumer products offered.

Participants' reflections on the past and their positioning within their narratives as learners, researchers, and part of a larger collective highlight the significance of their learning and cultural manifestation of historical consciousness (Gadamer, 2004; Shaw, 2017, 2021; Shaw & Donnelly, 2021a, 2021b). It highlights the role of family history narratives as dynamic cultural tools, used by participants to position and relate within and to a larger historical context, to make history "real" and foster empathy and consequential understandings (Jarvis, 2019; Karlsson, 2014; Nordgren, 2016).

Participants' motivations, experiences during the course, and findings reflect that family history research is a spectrum of experiences. Not simply the effervescence that is life-changing, as seen through the examples of crying participants on family history television programmes. Nor is it only the banal labelled family photo on the fridge. It is both extremes and everything in between. While much research has highlighted the life-changing aspects of family history research, it is equally important to recognise and examine the banality. As Billig (1995) cautions, banality is not synonymous with harmless but reproduces embedded ways of thinking. This is demonstrated by the recurring tropes and binaries in narratives of the primitive past/modern

present, moral past/immoral present, life-changing significance/banal everyday, and collective/independent. These reveal a layer of complexity to family history narratives that includes both the nostalgic and a challenge to traditional views.

Participants' narratives demonstrated that participation in, and the significance of, family history research is not always the effervescent excitement that is portrayed by commercialised marketing of ancestral companies and media. But it can and is a part of the everyday–something to do when the weather is bad or when your husband is golfing, a nice hobby. Their narratives demonstrate that this banality is also perceptible in their research findings–they were born, lived, and died in the same place. They had four spoons. They were all farmers. They all starved. Or, as Edda reported, there were no murders or thieves.

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Walking in their footsteps: Historical empathy and experiential learning on battlefield study tours

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ABSTRACT

Reflecting on my experience leading battlefield study tours for secondary school students, this article explores the pedagogical benefits of experiential learning for fostering historical empathy. I suggest that experiential learning offers students opportunities to engage with both the cognitive and affective dimensions of history, which are necessary for developing historical empathy. In doing so, I adopt Davison's (2017) conceptualization of historical empathy as a cognitive-affective "pathway" to demonstrate how experiential learning supports students' understandings of perspectives and experiences in the past. On the study tours, students *entered the past* by developing emotional connections to historical actors and particular places, based on their family histories and backgrounds. While visiting historic sites and interpreting battlefield landscapes, students *worked with the historical record* to build contextual knowledge and consider diverse perspectives. Finally, students *exited the past* to form ethical judgments about the World Wars and applied their learning within their communities back home in Canada.

KEYWORDS

Historical empathy, Experiential learning, Study tours, History education

CITATION

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Introduction

While teaching on a battlefield study tour in August 2019, I witnessed a secondary school student running as fast as they could, up from the water's edge toward the seawall at Juno Beach, where Canadian soldiers landed on D-Day during the Normandy Invasion 75 years earlier. The student later explained that they were timing their run; it took them 25 seconds to clear the beach and they determined that this was a long time to be exposed to gunfire. In reflecting on this experience, the student expressed how seeing the places where major events of the World Wars took place enhanced their understanding of what those at the time experienced. This student's actions and reflections highlight the significance of visiting historic sites for developing deeper understandings of past perspectives and experiences. The student evoked both cognitive and affective dimensions of learning about the past: not only was their historical inquiry informed by evidence (present-day landscapes) and context (warfare in the 20th century), but they also used their imagination to consider how soldiers may have experienced the landings. Additionally, this student showed they cared about the past, enough that they were motivated to run across Juno Beach during their free time.

Upon reflection, I realized this student was engaging in historical empathy—a process of attempting to understand the thoughts, feelings, experiences, decisions, and actions of people from the past within their historical contexts (Barton & Levstik, 2004; Endacott & Brooks, 2013). For nearly five decades, historical empathy has been a rich area of research in history education around the world, particularly in the United States and England (Brooks, 2009; Endacott & Brooks, 2018; Yilmaz, 2007). Scholars have presented various approaches, influenced by debates about whether historical empathy in schools should be a purely cognitive undertaking grounded in the methods of the history discipline (Blake, 1998; Bryant & Clark, 2006; Foster, 2001; Foster & Yeager, 1998; Lee & Ashby, 2001; Lévesque 2008; Yeager & Foster, 2001) or a cognitive-affective process that also allows space for a range of feelings, emotions, and connections to be present alongside historical inquiry (Bartelds et al., 2022; Barton & Levstik, 2004; Davison, 2017; Endacott & Brooks, 2013; Karn, 2023; Kohlmeier, 2006).

In recent years, there have been a number of classroom studies that reveal the content and pedagogies teachers use to foster historical empathy among elementary and secondary students. These studies highlight a range of activities that promote empathy, including writing tasks (Brooks, 2008; De Leur et al., 2017), discussions (Bartelds et al., 2020; Brooks, 2011; Doppen, 2000; Kohlmeier, 2006), debates (Jensen, 2008), role plays and simulations (Endacott & Pelekanos, 2015; Rantala, 2011; Rantala et al., 2016), multi-genre research projects (D'Adamo & Fallace, 2011), field trips (Bartelds et al., 2020; Cunningham, 2009), museum visits (Brauer, 2016; Innes & Sharp, 2021; Uppin & Timoštšuk, 2019), and virtual/augmented reality (Patterson, et al., 2022; Sweeney et al., 2018). Although these studies have made significant contributions to our understanding of how historical empathy may be approached in practice, there is very little discussion of experiential learning as a pedagogical approach.

Experiential learning is often described as "learning by doing" (Lewis & Williams, 1994, p. 5). However, such a broad interpretation incorporates all types of immersive learning experiences, from simulation scenarios within a classroom setting to field-based internships outside of the classroom. Due to these varied approaches, "the matter of definition of experiential learning is complicated" (Moon, 2004, p. 107). For the purposes of this article, I present an understanding of experiential learning that is tied to places of historical and contemporary significance, outside of the classroom. This form of experiential learning has been referred to by other scholars as an "outbound mobility experience" (Innes & Sharp, 2021), or more commonly as a "study tour" or "tour" (Atherton & Moore, 2016; Pennell, 2018, 2020). Keeton and Tate's (1978) definition of experiential learning is applicable to the study tour:

> Learning in which the learner is directly in touch with the realities being studied.
> It is contrasted with the learner who only reads about, hears about, talks about,
> or writes about these realities but never comes into contact with them as part of
> the learning process. (p. 2)

During study tours, students expand upon their classroom-based studies by learning through their engagement with particular places (e.g., historic sites and monuments, conservation areas, government institutions, community organizations). Thus, when I use the term "experiential learning" in this article, I am limiting it to the context of a study tour, which may take place locally or involve international travel.

With these areas of literature in mind, this article explores the pedagogical benefits of experiential learning for fostering historical empathy. It asks: what possibilities for fostering historical empathy might open up if we venture outside of the classroom to learn about past perspectives at historic sites, monuments, and other places within our communities? Reflecting on my experience leading battlefield study tours for Canadian secondary school students, I suggest that experiential learning offers students opportunities to engage with both the cognitive and affective dimensions of history, which are necessary for developing historical empathy. In framing this argument, I adopt Davison's (2017) conceptualization of historical empathy as a cognitive-affective "pathway." Despite some challenges and limitations, experiential learning can support students in coming to understand diverse perspectives and experiences in the past.

Educational context and sources

In working to identify the pedagogical benefits of experiential learning, I reflect on my experience as a teacher leading battlefield study tours for secondary school students. In 2018 and 2019, I led four experiential learning programs for the Vimy Foundation, a Canadian non-profit organization that aims to teach youth about the legacies of the World Wars. Each year, the Vimy Foundation's programs bring together students aged 14-17 from across Canada to visit memorials, cemeteries, museums, and other historic sites on the First and Second World War battlefields in Belgium and France. At the time I was involved in these programs, the Vimy Pilgrimage Award was a week-long educational program that took place in April while the Beaverbrook Vimy Prize program was two weeks in length and occurred in August. Both were fully funded experiential learning opportunities that emphasized educational experiences. Students were selected for each program from a national competition which required the submission of a resume, reference letters, a statement of volunteer work, and an essay. Those students on the shortlist were interviewed remotely and subsequently the finalists were announced.

Throughout each study tour, students were provided with many opportunities to reflect on their learning. In addition to group discussions at each site we visited, students wrote daily journals and blog posts, and they also completed post-program surveys. These opportunities to reflect before, during, and after the study tour were essential to the experiential learning process because, as a number of scholars have highlighted, reflection results in more powerful learning (Eyler, 2009; Kolb, 1984; Lewis & Williams, 1994; Moon, 2004; Silberman, 2007). As a teacher on these programs, I reviewed students' journals and blog posts to support an ongoing process of reflection and feedback on each tour. Throughout this article, I rely largely on my own pedagogical reflections based on my daily interactions with and observations of students. To highlight students' voices, I also draw from blog posts which were published on the Vimy Foundation's website during each program.[1]

An empathic pathway

To demonstrate the potential of experiential learning for developing historical empathy, I adopt Davison's (2017) conceptualization of historical empathy as a "pathway"—a fitting metaphor for experiential learning (see Figure 1). As he explains, the empathic pathway "represents students affectively entering the past and then cognitively working with the historical record before finally making an exit and arriving at a series of judgements" (p. 150). This approach to historical empathy places equal importance on the affective and cognitive dimensions, and best represents my own experience with how students developed historical empathy through experiential

learning. It also complements Kolb and Fry's (1975) theory of experiential learning, which emphasizes "the *integration* of concrete emotional experiences with cognitive processes" (p. 34, emphasis in original).

In the following three sections, I explore how experiential learning on battlefield study tours provided students with many opportunities to engage with both affective and cognitive dimensions of historical empathy. First, I consider how students *entered the past* by developing emotional connections to historical actors and particular places. Second, I describe how students *worked with the historical record* to build contextual knowledge and understand diverse perspectives by visiting historic sites and battlefield landscapes. And third, I explain how students *exited the past* to form ethical judgments about the World Wars and applied their learning to make a difference as young citizens in their communities back home in Canada. Although these study tours were not informed by Davison's (2017) theory of historical empathy, in retrospect, each of these three elements of the empathic pathway emerged organically throughout the programs, as revealed by students in their own words.

Figure 1

Visual depiction of Davison's (2017) empathic pathway. Designed by author, 2021.
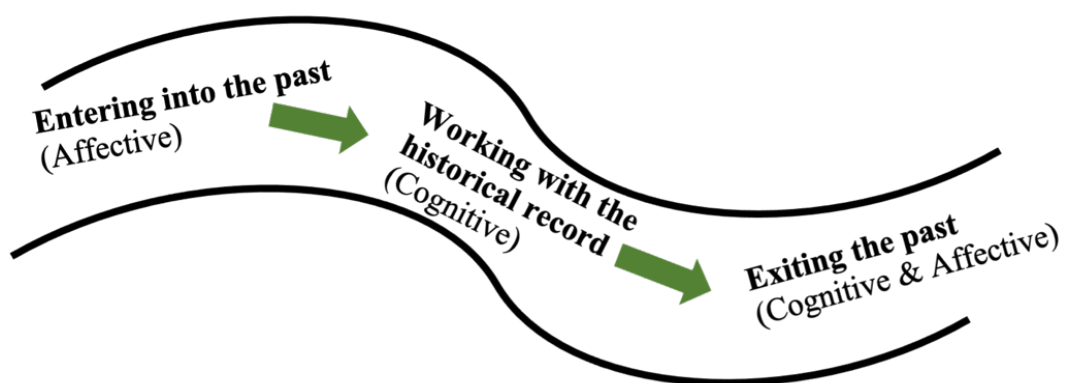
Entering into the past

When students enter into the past, they engage with the affective dimensions of historical empathy. According to Davison's (2017) empathic pathway, entering into the past involves open-mindedness, feeling care, and imagination. In his study, open-mindedness was signified by students considering values, beliefs, and behaviours that were different from their own. As students developed care for historical actors, they learned more about different perspectives and experiences. Imagination also allowed Davison's students to consider what it may have been like to live in another time and place, thereby, engaging them in learning about history. Though some scholars (Foster, 1999; Stockley, 1983) have raised concerns about the imagination overriding historical interpretations grounded in evidence and context, elsewhere I have proposed using the term "informed historical imagination" to encompass both cognitive and affective approaches to historical empathy (Karn, 2023). Engaging the imagination not only leads to more meaningful learning (Friesen, 2011; Judson & Egan, 2013), but students may also expand their abilities to empathize with historical actors, filling in gaps in the available evidence by imagining details that fit within the context of the time (Lévesque, 2008). This balanced approach, drawing on the imagination alongside historical evidence and context, was demonstrated by students throughout the Vimy programs.

From the beginning of each program, students developed affective connections with historical actors. They entered the past by learning about the wartime experiences of a Canadian soldier or nursing sister who was killed in Belgium or France during the First or Second World War. In addition to learning more about this individual's life and wartime experiences by conducting

research, students also completed a creative assignment, usually a tribute to the soldier or nursing sister in the form of a letter, poem, or song. This arts-based response allowed students to establish a closer, more emotional connection to the past.

Although each student formed an affective connection with a soldier or nursing sister, the nature of their link to the past differed. Some students selected individuals from their hometowns, while others had family connections to the wars or some other personal connection to the chosen individual. For example, one student researched the first Canadian nursing sister killed in action overseas because "I have a lot in common with her: she was born in my hometown, graduated from my high school, and entered the medical field like I hope to next year" (blog post, April 2018). This student highlighted the added significance of learning about a woman killed during the war because it allowed them to understand female perspectives in the early 20th century.

In another case, a student selected two Black soldiers for their project and developed care by identifying similar life experiences. During the program, this student expressed feeling closer to the soldiers because they also faced racism and discrimination. However, the student accounted for historical contexts by recognizing that, because they lived during a different time, their struggles differed in many ways. Through getting to know these soldiers' stories, this student developed a connection to the past that made history more meaningful. I remember this student explaining that prior to researching these soldiers, they did not know that Black Canadians served in the First World War or that there was a segregated Construction Battalion because soldiers were usually represented as white in history textbooks. In their words, "…I did not believe that I had a place in Canadian history" (blog post, April 2019). The student reflected on how learning about more diverse perspectives impacted their view of history because they now saw the wars as part of their own history. By learning about individual soldiers and nursing sisters, students gained deeper insight into the thoughts and experiences of wartime Canadians and demonstrated care toward historical actors before they even visited the battlefields.

Affective connections to the past were also encouraged at each place we visited by allowing students time to interact with artefacts, monuments, and landscapes on their own. Upon arrival at each site, students were encouraged to draw upon their senses and prior knowledge to imagine how people in the past may have experienced the place. For example, we asked questions such as, "What sounds might a soldier have heard here 100 years ago?" These types of questions elicited affective responses in students because our senses are closely tied to our emotions. As students explored the sites, they connected with them differently and noticed certain things depending on their own backgrounds and experiences. A Sikh student shared that seeing a Sikh soldier's name listed on one of the memorials we visited "added a personal connection to the experience" (blog post, April 2019). Another student became emotional upon reading an epitaph on a headstone, dedicated by a mother and sister, because it made them think of their own brother who was around the same age as the soldiers who fought in the First World War. By exploring sites on their own, students were able to activate their prior knowledge while taking in their surroundings, which often led to a desire to work with the historical record and learn more about the people connected to the places we visited.

Working with the historical record

The next step along the empathic pathway involves working with the historical record, moving students from an initial affective connection to deeper understanding and empathy. As Davison (2017) explains:

> Historical empathy's cognitive elements of exploring evidence, building contextual knowledge, finding multiple perspectives and being aware that past and present are different become helpful once students have, so to speak, entered the past and now begin to work with the record of that past. (p. 152)

In my teaching experience, the affective dimensions of historical empathy continued throughout this stage and, in fact, augmented students' abilities to examine sources, consider contexts, and identify multiple perspectives.

On the study tours, students were surrounded by a wide variety of artefacts at the museums we visited, but the most memorable for students were those that remained in their original form on the battlefields. In France, students had the rare opportunity to go down into the Maison Blanche cave, where many Canadian soldiers waited to launch the assault on Vimy Ridge on 9 April 1917. In reflecting on this experience, one student portrayed the cave as a valuable primary source:

> It [Maison Blanche] contained a multitude of carvings or "graffiti" which are very significant in the understanding of the thoughts and attitudes of the soldiers who stayed there. I found it to be an especially unique way of gaining insight into the mindset of soldiers in the First World War. (blog post, August 2018)

In some cases, students were able to infer how soldiers felt at the time based on their carvings. For example, a few soldiers carved farm animals and students inferred that this represented how much the soldiers missed their farm and family. Although these carvings have been photographed and replicated for museum and online exhibits that any student could have access to, the experience of being underground in the dark, damp cave provided students a glimpse into how soldiers may have felt during their time there.

Experiential learning also provided students the opportunity to interpret landscapes across Belgium and France as primary evidence, building from their initial emotional reactions and sensory experiences. While walking the terrain where significant battles took place, students were asked questions such as, "Based on your view of this landscape, why do you think those in leadership positions made the decision to launch an attack here?" As they viewed the "high ground" in places like the Ypres Salient in Flanders or Hill 145 at Vimy Ridge, students began to understand how important the natural environment was to informing decision-making during the First World War. In their group discussions and written reflections, students also commented on how the weather helped them gain new perspectives and understandings of wartime conditions. For example, during a rainy visit to the Beaumont-Hamel Newfoundland Memorial in France, one student empathized with how difficult it would have been for soldiers to see through the rain and fight through the mud.

In combination with viewing the landscapes, students also examined primary sources to help contextualize the significance of the site. For instance, students read war diaries (unit intelligence logs) from the Canadian infantry battalions that landed at Juno Beach on 6 June 1944, while sitting around a beach-side monument. During our group discussion, many students remarked that it was surreal to be reading historical records written almost 75 years earlier, near the location where soldiers had been fighting. One student said they appreciated being able to visualize the landmarks identified in the documents to achieve a deeper understanding of what took place and how decisions were made at the time. In their blog post written later that day, another student remarked, "It was also an amazing experience to be on the beach and see the geography of it all. It made it much clearer in my mind" (blog post, August 2018).

Throughout the programs, students also learned about the World Wars from local residents, tour guides, and veterans. Each offered diverse perspectives that are often overlooked or not as easily accessible in Canadian history classrooms. In particular, our Belgian tour guide on the Ypres Salient left a lasting impression because their storytelling approach was meaningful and allowed students to feel more connected to the histories and ongoing legacies of the First World War. Students appreciated hearing family wartime stories as records of the past, while visiting some of the actual places where these stories played out.

Exiting the past

Once students have engaged with the historical record, they are invited to exit the past, which involves both cognitive and affective dimensions of historical empathy. At this point along the empathic pathway, students are offered opportunities to use what they learned to form or examine judgments about the decisions, events, and perspectives under study. Davison (2017) explains that this is "a time when I encourage reflection on the practical consequences of what has been studied" by exploring contemporary issues and debates related to the topic" (p. 153). Throughout the study tours, students applied their knowledge and insights gained through experiential learning in order to develop informed judgments about wartime decision-making. Perhaps the best example involves the Allied raid on the port city of Dieppe on 19 August 1942, a tragic day in Canada's military history, which is often portrayed as a "catastrophic failure" (Lévesque, 2008, p. 156). During our time in the town of Dieppe, students experienced the landscapes that played such an instrumental role in the raid's devastating consequences. On each program, I led our group of students from the shoreline up the steep, rocky beach surrounded by the imposing cliffs. As they traced the footsteps of the soldiers who landed at Dieppe, students seemed to better understand how the harsh terrain and lack of natural cover resulted in so many casualties. According to one student:

> I was drawn in as soon as I stepped foot on the rocky beaches… Seeing the landscape, hearing the sounds, and feeling the burn of my muscles as we explored the terrain truly put the event into perspective for me. (blog post, August 2018)

At this point, many students formed the conclusion—if they had not already—that the Dieppe raid was doomed to fail. However, by reading firsthand accounts and studying maps of the French coastline, students began to understand the point of view of decision-makers at the time.

On one program, we engaged in a passionate discussion about the decision to attack, from a clifftop vantage point where we could see along the entire beach. In groups, students read through evidence packages about various locations along the French coast where a raid could have been launched in 1942. As one student explained, "We were given only certain information and I realized how the Allies were working with incomplete intelligence of the German defence" (blog post, August 2019). In the end, most students decided that Dieppe was the best of very few options for a raid along the French coast. Following the activity, many students reflected on how their perspective of the raid and the judgments they had previously made about the military leadership's decision-making changed as a result of this simulation activity that took place overlooking the beaches at Dieppe.

The empathic pathway need not end with the conclusion of an experiential learning opportunity. After hearing the stories of Canadian soldiers and nursing sisters, and interacting with veterans and local residents overseas, I recall that one student in particular began to care deeply about the lives of veterans who survived the war. This student recognized that Canadians have served in other conflicts around the world since the Second World War and wanted to hear their stories as well. With the help of other students in their school's history club, the student decided to hold an appreciation luncheon for veterans in the community. Local veterans were invited to the school to share their stories with students, honour the fallen in past conflicts, and support the men and women who serve in the Canadian Armed Forces today. This student's actions suggest that they translated historical empathy into everyday empathy through experiential learning on these programs. In doing so, this student demonstrated civic engagement, motivated by a genuine desire to understand, help, and honour Canadian veterans today.

Through this experience, students learned to recognize connections between the past and present, and considered how these connections might inform their values moving forward. I remember one student reflecting on how learning about minority communities in war contributed toward a sense of respect for what certain groups have experienced, and they expressed an increased desire to support reconciliation efforts in different contexts. This student showed

greater awareness of diverse experiences, as well as a willingness to engage in reconciliation moving forward. Whether taking action or reconsidering their prior values, these students demonstrated the potential historical empathy holds to "help students develop a stronger awareness of needs around them and a sense of agency to respond to these needs" (Endacott & Brooks, 2013, p. 45).

Challenges and limitations

Although I have provided insight into the many benefits of experiential learning for developing historical empathy, there are also some challenges and limitations that should be addressed. A number of researchers have pointed to the limitations of anyone's ability to understand people's thoughts, actions, and decisions in the past (Endacott, 2010; Lowenthal, 2000; Shemilt, 1984; VanSledright, 2001; Wineburg, 2001). For instance, Jenkins (1991) concludes that "empathizing effectively is impossible" (p. 48) because we cannot enter into the mind of someone who lived in a different time. Likewise, we cannot physically walk in the footsteps of people who lived in the past, even while engaging in experiential learning.

Studies have shown that students often face difficulties in setting aside their own lived experiences and perspectives to understand historical actors who live in vastly different times and places (Barton & Levstik, 2004; Endacott, 2010). Throughout each study tour, many students recognized the limits to being able to empathize with historical actors whose experiences differed greatly from their own. In their reflections, students often explained how at each site we visited they tried to imagine what it may have been like to be a soldier who fought there, but many admitted that they found it difficult to truly understand. For example, one student expressed, "That kind of courage is unimaginable to me. I have never been thrust into a situation dire enough to require it" (blog post, August 2018). These challenges expressed by students highlight the limitations of our imagination—that is, how far one can reach when supposing or inferring details about the past based on available evidence (Lee, 1984). When empathizing with others, it can be difficult to make an "empathetic leap" between the past and present (Seixas & Morton, 2013, p. 144).

In attempting to span this gap of time between the past and present, students are likely to engage in presentism, or viewing the past through the lens of the present (Miles & Gibson, 2022; Wineburg, 2001). Although we continually encouraged students to consider the knowledge and perspectives held at the time, some students continued to condemn certain decisions by military leaders as reckless and ill-informed. In this way, some of our students demonstrated just how difficult it can be to set aside our knowledge of how events unfolded, when attempting to understand the decision-making processes that led to particular consequences—consequences that we have the privilege of knowing in the present. On a related note, students also commented on the difficulties of setting aside preconceived notions of history formed through popular culture (films, books). In the case of the Second World War especially, student perceptions were often informed by Hollywood interpretations that may not always be historically accurate, so setting aside these perspectives can be a barrier to empathizing with historical actors.

Another significant challenge involved the affective dimensions of historical empathy. In their written reflections, many students commented on the obstacles they faced in discussing their emotions or writing them down. They often identified specific sites (usually cemeteries) that evoked sadness and despair, which they found difficult to process. One student explained that upon finding their soldier's name etched on the wall of the Menin Gate in Ypres, Belgium, "I was so overcome with emotions of all sort [*sic*] that I began to cry. I was speechless" (blog post, April 2019). In some cases, students' personal or family experiences with war, death, or trauma in other contexts triggered an emotional response to learning about the First and Second World Wars. These situations underline the importance of developing understanding and trust with students to support their emotions and wellbeing, and to recognize the many different ways that students may respond to encountering difficult knowledge (Britzman, 1998).

Conversely, there were times when students explained that they did not feel any emotional connection to people in the past, particularly in their journals which were only read by the teachers. Some expressed surprise that they did not cry while giving their soldier tribute, and other students explained how they felt a significant sense of separation between the past and present because they could not speak directly to historical actors. As with any learning experience, the students on these study tours responded in very different ways and, therefore, their process of engaging with the empathic pathway looked different.

Beyond this particular study tour, other experiential learning opportunities may face different challenges. I recognize the unique nature of the Vimy Foundation's programs and the influence certain factors may have over students' engagement and motivation to empathize with others. The First and Second World Wars are areas that many students are interested in learning about and have prior knowledge of, due to the prevalence of family histories and Remembrance Day ceremonies that inform our collective memory of the wars. The students on these programs were also willing to take part in an extensive application process and were selected by the Vimy Foundation based on their commitment to academics and volunteer work. In these ways, my experiences on these study tours and with these students are not representative of all experiential learning opportunities, and other topics and approaches will likely bring about new challenges and limitations—as well as new opportunities.

Conclusions

In this article I have provided a glimpse into my own teaching experience to highlight the potential of experiential learning for fostering historical empathy. Throughout the study tours, students engaged with the cognitive and affective dimensions of history to better understand diverse perspectives and experiences in the past, despite the noted challenges and limitations in doing so. As students walked the battlefields—and developed emotional connections, analysed landscapes as evidence, and formed ethical judgments—they were also walking along Davison's (2017) empathic pathway. This teaching experience has demonstrated that the pathway metaphor is particularly fitting for pedagogical approaches to historical empathy centred around experiential learning. By venturing outside the classroom, new pathways are forged for fostering empathy.

While this type of study tour may be pedagogically valuable, I realize it may not be possible to incorporate long-distance travelling into elementary or secondary history programs due to budgetary, safety, and time constraints. Therefore, I suggest that Davison's (2017) empathic pathway can also be taken up in other learning contexts and through local connections with place. Students may be invited to enter the past closer to home by writing biographies of historical actors in their own communities to explore their thoughts, actions, and decisions. As a follow-up, teachers can facilitate tours of local historic sites, buildings, monuments, memorials, and neighbourhoods to further explore connections to the historical actors' lives. Visiting local sites and viewing landscapes also offers students opportunities to work with the historical record. For instance, conservation areas and industrial sites can serve as primary sources that reveal the histories of human impacts on the environment. As they exit the past, students may form judgments about past values, actions, and decisions within their own communities, and consider their legacies for today (Gibson, 2017, 2021). Students may also be encouraged to become involved in community movements and organizations to effect positive change on issues with deep historical roots. With these ideas as a starting point, history and social studies teachers are invited to incorporate experiential learning into their practice and share their encounters with other teachers to foster a generation of more empathetic youth.

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Acknowledgements

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Endnotes

[1] Queen's University's (Kingston, Canada) ethics board granted approval for me to include de-identified direct quotations from students' blog posts. These blog posts were written and published during each tour and were publicly accessible on the Vimy Foundation's website until recently. Now the blogs have been placed in an archive, to which I was able to gain access with permission from the Vimy Foundation.

Teaching sensitive topics: Training history teachers in collaboration with the museum

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ABSTRACT

Discussing sensitive topics, such as slavery, political extremism or religion, in the history classroom presents an interesting challenge for history teachers and museum educators. The goal of this small-scale case study was to evaluate a domain-specific professional-development course for Dutch history teachers that was developed in cooperation with museum educators. This course trains teachers to explore the dynamics of and multiple perspectives on a heritage object by asking historical questions, starting from an overarching main question. We investigated: 1) to what extent trainee and experienced history teachers felt competent in teaching sensitive topics before and after the training; and 2) how three experienced history teachers discussed multiple perspectives in a follow-up lesson after the training. Results showed that teachers reported higher self-efficacy in teaching sensitive topics and that the course offered them practical ideas about how to discuss these kinds of topics in their classrooms. Lesson observations showed that the teachers applied some parts of the design principles demonstrated in the course. This article discusses how using tangible heritage objects could support history educators in negotiating sensitive issues.

KEYWORDS

Sensitive topics, History education, Teacher professional development, Museum education

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Introduction

Teacher education and professionalisation should prepare teachers to teach sensitive topics. However, little research has been done on how and the degree to which teachers are prepared for this (Pace, 2019). Teaching sensitive topics offers opportunities to make students aware of different perspectives in and on the past, which is an important skill to acquire in democratic societies. But it also demands pedagogical flexibility with students (or communities) who respond emotionally, causing teachers to fear and avoid sensitivity. From a pedagogical and interpersonal perspective, teachers often know how to handle classroom discussions and how to respond to disruptive behaviour. In addition, there are many tools and training courses that support teachers to develop de-escalating skills (Hess, 2009; Johnson & Johnson, 1996). In our view, these approaches could be supplemented with more domain-specific approaches that develop teachers' pedagogical content knowledge regarding sensitive topics.

From the perspective of history education, teaching methodology theories provide insights into historical thinking and dealing with multiple perspectives that can offer teachers starting points and guidance to discuss sensitive topics with their students (Savenije, Wansink & Logtenberg, 2022). Because the sensitivity of historical issues currently often manifests itself in discussions involving concrete cultural heritage (such as statues, paintings, and objects) it could be useful to step outside the history classroom and work together with museums (Marcus, Levine & Grenier, 2012; Rose, 2016; Savenije & de Bruijn, 2017). Based on this idea, we developed a domain-specific training in which we show teachers the possibilities of teaching sensitive topics using concrete (museum) objects and multiple perspectives through time. In this article we explain the design principles of our approach. We also explored the contribution of this training to teacher self-efficacy in teaching sensitive topics and the extent to which teachers succeed in discussing sensitive topics with their students from multiple perspectives through time.

Reasons for sensitivity

Sensitive topics can be characterized by the fact that the focus lies on a traumatic past, which is told through the perspective of victims with whom students may feel a strong connection (Sheppard, 2010). For example, history lessons on the transatlantic slave trade could strongly emphasize the point of view of enslaved Africans, stimulating students to emotionally empathize with this perspective. Furthermore, topics may become sensitive when students or teachers perceive them as a threat to the image of the group they identify with (Goldberg, 2017). In the Dutch context, 'Black Pete' is an example of a sensitive tradition, where one group, that regards this figure as a symbol of a festive children's event, feels their identity threatened by another (growing) group, that sees this tradition as a painful remembrance and continuation of feelings of oppression and racism. Based on their own social identifications in the present, students relate to particular historical groups (i.e. slave traders and enslaved persons). This example also demonstrates another factor of sensitivity; trough students' social identifications diverse and conflicting moral perspectives may become apparent. Teachers often refer to the social or religious background of students when explaining the reasons for sensitivity (Savenije et al., 2022;

Savenije & Goldberg, 2019). Taken together, trauma, social identity and moral values can give rise to emotional responses in the classroom.

Research findings on teachers' experiences in dealing with sensitive topics provide a rather mixed picture. A Dutch study involving 1,117 teachers (Sijbers, 2015) reports that teachers feel competent to deal with tensions in their classrooms, but when teaching in the lower levels of secondary education, they do have trouble with topics such as anti-Semitism, Islam, and fundamentalism. In a study involving 82 Dutch history teachers, it was found that teachers are especially challenged by emotional responses and over-simplified opinions in the classroom on topics such as Islam, the Holocaust and slavery (Savenije et al., 2022; Savenije & Goldberg, 2019). Two exploratory studies (De Graaff et al., 2016; Kleijwegt, 2016) report that student teachers and teachers in pre-vocational secondary education do not feel competent to teach sensitive topics because they have not fully developed their role as moral educator. In general, teachers experience a gap between their personal worldview and the worldview of their students. This gap is widened due to teachers apparently having little insight into the sources of information that students use while developing their opinions. Furthermore, teachers require support in facilitating content-specific classroom discussions and disciplinary interaction (Reisman et al, 2018).

International research paints a similar picture regarding the reasons why teaching sensitive topics is difficult for teachers (Nystrand et al. 2003; Saye & Social Studies Inquiry Research Collaborative (SSIRC), 2013; Wooley, 2017). Besides fear of emotional responses in the classroom (Goldberg, Wagner & Petrović, 2019), teachers sometimes experience pressure from parents, school boards or the local community (Misco, 2017; Girard et al., 2021). Furthermore, teachers tend to avoid sensitive topics because of their own values or opinions (Kello, 2017). Zembylas (2017) argues that teachers can develop resistance towards other perspectives because of the affective dimensions of sensitive topics. Carefully creating 'affective disruption' and opportunities for teachers to start questioning their beliefs and emotions with less sensitive issues could support them in engaging with sensitive histories (Zembylas, 2017).

Characteristics of a domain-specific approach

In the Netherlands, professional development courses on teaching sensitive topics often relate to goals of citizenship education. They focus mainly on general conversation techniques and learning to see different perspectives (e.g., SLO & Diversion, 2016; Hess, 2009). Research has shown that it is essential to introduce students to the fact that individuals can have different perspectives on a particular topic due to religious beliefs, cultural background, and moral views (Oulton et al, 2004). Domain-specific research in history education offers further directions for history teachers to discuss multiple perspectives in the classroom. By analysing motives, values, identities, and viewpoints of people within a specific historical context, students can learn to understand a perspective that is different from their own (Van Drie & Van Boxtel, 2008; Barton & McCully, 2012; Seixas & Morton, 2013; Goldberg, 2014).

Research into informal museum education and heritage can offer teachers valuable insights and tools to discuss sensitive topics with their students (McCully, Weiglhofer & Bates, 2021). Tangible objects can help students with developing historical thinking skills, such as historical perspective-taking (Savenije & de Bruijn, 2017; Savenije, van Boxtel, & Grever, 2014), analysing sources (Marcus & Levine, 2011) and understanding the nature of disciplinary thinking (Seixas & Clark, 2004). Objects, and the stories behind these objects, can evoke different emotions, which is an important part of triggering these kinds of skills. McCully et al. (2021) investigated museum visits of Protestant and Catholic student groups in Northern Ireland and discovered that an affective impact of museum material, such as objects and personal testimonies, coincided with deeper questioning. They concluded that affective disruption (Zembylas, 2017) provoked by museum objects can stimulate critical thinking. Museum objects can render the relationship between the past, present, and future more tangible. In addition, they can show that people (now and in the past) can have different opinions on the meaning of the object. This understanding can

be developed further by offering students (and visitors in general) information about why an object is exhibited and encouraging them to evaluate these reasons (Gosselin, 2011). In this way students are offered an accessible, inclusive, and safe opportunity to discover their own perspectives and emotions (Gómez-Hurtado, Cuenca-López, & Borghi, 2020) and those of other people now and in the past. Concrete heritage objects within the walls of a museum could provide a relatively risk-free opportunity to evoke different emotional responses. Therefore, they are a valuable addition to the abstract and textual information that is often discussed in history lessons.

In order to be able to discuss multiple points of view on a museum object in a structured manner, we suggest using a layered approach which distinguishes between different perspectives on the object in the historical time (when the object was made/used), the present time, and the historiographical time (the period, between the historical and present time, in which people have written about the historical time of the object; e.g. the time the object was placed in a museum) (Wansink, 2018). For example, a statue of the famous 17th century Dutch East India governor-general Jan Pieters zoon Coen raised different feelings and reactions in the 19th century (when the statue was made) than it does in present-day society. Showing students these differences and similarities of perspectives through time may help them deal with current issues and understand certain emotions. It allows them to gain some distance from their own opinions and stimulates historical thinking.

Finally, in a domain-specific approach it is essential to consider the questions that could be asked by teachers and students. Questions can be formulated from a disciplinary perspective, based on the big ideas or concepts of the historical discipline, such as time, evidence, continuity and change, causality, historical significance and ethical perspectives. Such questions not only can stimulate students to examine the object from multiple perspectives and engage different historical thinking skills, but can also reveal their own way of looking at and thinking about the past. (Seixas & Morton, 2013; Logtenberg, 2012; Savenije & de Bruijn, 2017; Wansink, Logtenberg, Savenije et al., 2020). Focusing on learning to ask questions could also help in maintaining a constructive dialogue regarding sensitive issues, which focuses less on judgements and polarized answers. Questioning from different perspectives could contribute to 'cooling down' hot issues, for example by looking from a historiographical perspective in the case of a contemporary issue. This could also provide support in de-escalating a heated discussion (Savenije & Goldberg, 2019). In addition, questions can also 'warm-up' issues that are not sensitive at first glance, for example by exploring them from a moral perspective. Both 'warming-up' and 'cooling-down' can be helpful because these questioning activities show the heterogeneity of perspectives and stimulate students to empathize with other perspectives (Kello, 2016).

The present study and research questions

The insights outlined above were incorporated into a professional development course for teachers that was developed in collaboration with researchers, history teacher trainers and a museum educator. The training takes place in a museum and starts from a concrete museum object that can evoke different emotions and opinions (in this case the unwrapped mummified body of a young boy from Ancient Egypt at the Dutch National Museum of Antiquities). The educator discusses perspectives on the object from different times (historical, historiographical, present) and poses historical questions in order to show that sensitivity changes over time.

The training is set up in such a way that teachers first experience the teaching material as participants and reflect on the underlying design principles. After this introduction, teachers are challenged to practice with these principles with other museum objects. Finally, they are asked to translate them into a history lesson that they deliver in their own classroom. Research into the professional development of teachers has shown that activating participants by walking them through an example lesson appears to be more effective than simply offering teaching materials (Darling-Hammond et al., 2017). The underlying idea with this training is that teachers, having experienced an example themselves, can use this approach when an expected or unexpected issue emerges during teaching.

The following research question was investigated to evaluate the outcomes of this training: to what extent do history teachers after the training:

- Feel competent in teaching potentially sensitive topics?
- Discuss different perspectives from different times on a sensitive topic, using a concrete object in their lessons?

Methods & data sources

In the following section we describe the participants, design of the training and the data collection with questionnaires and an observation instrument. An overview is in Table 1

Table 1

Training and data collection

	Process	Instrument
Training with 3 experienced teachers	Collected data on experience with and self-efficacy in teaching sensitive topics before and after the training.	Questionnaire
Training with 29 trainee teachers		
Lessons of 3 experienced teachers	Video-recorded and observed lesson based on the training	Observation instrument

Participants

Participants were 29 in-service student teachers and three experienced history teachers. The experienced teachers were (to ensure anonymity, pseudonyms have been used): Ewald (33, 10 years' experience, small town context), Nicole (41, 18 years' experience, urban context) and Roland (29, 8 years' experience, urban context). All participants were teaching in the lower levels of Dutch secondary education (vocational education, students between 12 and 15 years old). We purposefully recruited participants teaching at this educational level because not much research has been done with these groups (even though approximately 60 percent of Dutch students are enrolled at this level) and teaching sensitive issues seems more challenging than with older students in higher levels of education. The training was the same for both teacher groups but was given at separate meetings.

The training

The training was developed within the context of a museum. To enable transfer to other contexts and museums, the design principles that formed the core of the training were made explicit:

- start from an overarching main question around a concrete heritage object;

- explore, by asking historical questions:
  - multiple perspectives on the object over time (historical time, historiographical time, present time) and
  - the dynamics of the object's sensitivity over time.

By focusing on one object and starting from a central question, the sensitivity of the subject becomes immediately visible and tangible, so that possible tensions do not arise unexpectedly. The second principle aims to create or maintain some distance from the sensitive subject by historicizing it. At the same time, explicit focus on multi-perspectivity ensures that the different perspectives that people can have on a subject are not avoided (Wansink et al., 2020). Working with concrete heritage objects is easier to achieve in a museum. In a classroom it will often be necessary to work with images or with indirect representations of material culture that cannot

always be physically present. In this research we decided to give the training in a museum and allow teachers to experience the added value of working with concrete objects and a museum educator. This museum context provided tangible insights into the dilemmas and complexity of conserving and presenting cultural heritage.

The training, given by a teacher trainer and a museum educator, started with a case about the choice not to exhibit the unwrapped mummified body of a young boy from Ancient Egypt in the museum. This case touches on an ethical issue about the handling of human remains in three different times (Ancient Egyptian times, the nineteenth century and the present). The overarching question was: 'how do we deal with human remains?' The educators discussed different perspectives on this issue through time, based on the questions why and how the boy was mummified in the ancient Egyptian past (historical time), why the mummy was purchased by a Dutch museum in the 19th century (historiographical time) and why the museum has recently decided not to display the unwrapped mummy (current time).

During the training, the design principles were explained and discussed using this case as an example. Next, teachers were given the opportunity to practice with the principles by applying them to a different object in the museum. Finally, teachers were instructed to design a lesson on a sensitive topic based on the design principles.

The training was given for the first time to the three experienced teachers and was subsequently repeated with the 29 trainee teachers. Only the three experienced teachers were asked to design and give a lesson at their own schools.

Instruments and analysis

Before the training took place, data on teachers' and student teachers' experiences with teaching sensitive topics were collected through a questionnaire used in international research that aims to explore which topics are considered as sensitive, the reasons for sensitivity and the teaching approaches that are applied to deal with these sensitivities (Goldberg et al., 2019).

A self-efficacy questionnaire on teaching sensitive topics (adapted from Zee et al., 2016) was administered before and after the training. Self-efficacy can be defined as an individual's perceived ability to influence the environment despite external factors (Bandura, 1997). In this study, it was defined as confidence in teaching sensitive topics. Compared to what teachers say they do in their lessons, confidence in their own abilities offers a more reliable picture of their actual approach in the lesson. For example, if a teacher is confident in his/her own ability to get students to listen to each other in a class discussion, this is a relatively reliable indication of whether the teacher manages to accomplish this in his/her own practice (Tschannen-Moran, Woolfolk Hoy & Hoy, 1998). Participants were asked to rate their performance through a series of questions, such as: how well do you manage to limit disruptive behaviour in the classroom? These questions were supplemented with items from a questionnaire specifically aimed at measuring the extent to which teachers consider themselves to be able to involve students from different backgrounds (Siwatu, 2007). This questionnaire consisted of 20 items ($\alpha = 0.86$) on a 7-point scale. An example question is: to what extent are you able to create a learning community when the class consists of students from different backgrounds?

After the training, teachers' and student teachers' experiences were collected through the same questionnaire, which now included a series of open prompts (e.g., the training has/has not offered me support in dealing with sensitive topics, because….). The answers to these questions were analysed based on the design principles of the training.

The three experienced teachers were instructed to design and teach a lesson on a sensitive topic, using the design principles of the training. The teachers were given free choice in choosing a sensitive subject and teaching context. All three teachers prepared a lesson for a lower secondary vocational class. The three lessons were video-recorded and observed by two researchers who were present during the lessons. An observation instrument for analysing history lessons (Gestdóttir, 2018) was used during the lesson observation (see Appendix). It was adjusted for this study based on the model of multi-perspectivity (Wansink, 2018) and a study on

the use of cultural heritage for historical reasoning (Baron, 2010). The analysis focused on the following criteria:

1) the lesson is built around a concrete object or phenomenon
2) an explicit central question is asked
3) multiple perspectives in the past, present, and historiographical time are discussed
4) historical sources are used
5) the lesson includes interaction between teacher and students and between students.

While the observations focused on the actions of the teacher, the analysis also provided us with some information on interaction between the teacher and students and the questions students asked.

After the lesson, the teacher briefly evaluated the lesson with the observing researchers. Subsequently, the lessons were reviewed in a meeting with all researchers, teachers, and the museum educator. Data were analysed by two researchers: data from the questionnaires was calculated and categorized, while the lesson observations were used to provide a systematic description of the lessons given by the three experienced teachers. In the presentation of the results, we provide a detailed description of the cases, so that they can also serve as concrete practical examples of working with the design principles set out above.

Results

Perceptions of sensitivity before the training

The 29 student teachers indicated that they experienced the following topics as sensitive: slavery/colonialism, Holocaust /WWII, terrorism, Islam, and immigration/refugees. The reasons for sensitivity mainly lay in the controversial nature of these topics in the public debate. They also reported feeling worried about hurting students' feelings and dealing with students' emotions in general. Furthermore, teachers indicated that they sometimes experience a knowledge deficit when it comes to discussing current issues in the public debate. In response to the open question about who might be sensitive to these issues, most student teachers referred to the cultural or religious background of students (migrant, Dutch, Surinamese, Moroccan, Muslim, Christian). However, several teachers also indicated that some subjects could be sensitive for everyone.

The three experienced teachers also reported their experiences with sensitive issues. Teacher Ewald, who teaches in a small-town context, mainly referred to religious subjects, because many of the enrolled students had parents with a Christian background, and migration, because of the political preferences of the students. He indicated that he was always trying to point out the 'beauty of these differences' to students and to create a safe atmosphere in the classroom but he did not always succeed. Ewald testified to the fact that he has sometimes avoided teaching human evolution theory, because of the discomfort he felt about conflicting with parental opinion and because he was unsure whether he would be able to remain neutral himself.

Roland, teaching in an urban area, explained that emotions in the classroom, which in his view obstruct deeper learning, pose a challenge to him. He tries to ask many questions, whilst avoiding passing judgement. At the same time, he indicated that he did not evade any subject. Nicole, who teaches in a metropolitan context, pointed out that the Palestinian conflict, slavery, and the phenomenon of the multicultural society are sensitive topics among her students. They may become angry and get caught up in their own emotions. When this happens, she is used to de-escalating before she goes back investigating the matter through dialogue.

Self-efficacy to teach sensitive topics

After the training, 29 student teachers showed a slight increase on the self-efficacy-scale of teaching sensitive topics. Two of the experienced teachers showed an increase, while Nicole showed a slight, but negligible, decrease (see Table 2).

Table 2

Mean scores on the self-efficacy scale before and after the training (Likert-scale 1-7)

	Before	**After**
Student teachers (n=29)	4.98	5.25
Ewald	4.25	4.60
Nicole	6.35	6.15
Roland	4.85	5.15

This increase is partly explained by clearly higher ratings on items related to dealing with cultural diversity in the classroom. Although it remains unclear to what extent the training contributed to this rise, its focus on exploring multiple perspectives on a concrete object did offer tools for dealing with cultural diversity.

Lesson observations

Teacher Ewald used 'Mussert's Wall' as a heritage object in his lesson for a group of first-year pre-vocational secondary school students (12 years old). This wall, together with the meeting place in front of it, is the only remnant of a complex used by the Dutch National Socialist Movement (NSB) and their leader Anton Mussert for large party rallies during the 1930s in the Netherlands. When a local heritage association submitted a request in 2015 to include the wall on the list of national monuments, a fierce debate arose about whether this remnant of a difficult history should be preserved or not. The sensitivity here arises from the fact that this site was built and used by national socialists and, hence, represents a perpetrator perspective. In addition, there was concern that such a historical object could provide a platform or become a 'pilgrimage site' for far-right sympathizers, potentially fueling antidemocratic and antisemitic ideas.

The central question in the lesson was whether Mussert's Wall should be demolished (criterion 1 and 2). Using a worksheet and classroom instruction, students were offered several different perspectives on this question, acknowledging the three different time layers (criterion 3). The period of historical time comprised the construction of the wall and its use for political meetings between 1936 and 1940 (During WWII, the German occupier prohibited political meetings). Further lesson material dealt with how the wall was used for other activities after the war and how, in fact, it had been 'forgotten' for a long time (historiographical time). Most of the lesson focused on the present-day discussion about whether the wall should be demolished or listed as a historic monument. The sources used were mainly contemporary and provided conflicting views about the wall (criterion 4). Students completed assignments on a worksheet and there was some interaction between individual students and the teacher, but little interaction between students themselves (criterion 5).

None of the students seemed to experience the subject as sensitive at the start of the lesson. Students mainly thought the wall could be removed for pragmatic reasons: its removal would provide space for the camp site that was built on the site after the war. By the end of the lesson, some students had become more aware of the sensitivity of the issue. The teacher had clearly applied the design principles of the training and introduced his students to different perspectives on a sensitive topic. The question remains whether the relatively indifferent reaction of the students was a consequence of this approach, and thus increased the negotiability of the subject,

or was a result of the students not having any strong opinions on this subject at all. After the lesson, the teacher acknowledged that interaction between students had been largely absent, but that it had worked well to structure the lesson around one object.

Teacher Roland gave a lesson about the 'Black Pete' debate in a second-year pre-vocational secondary education class (13-14 years old students). This debate featured prominently in the news at that time and concerned the controversial black-faced companion of St. Nicholas, an annual children's feast that is celebrated in December. This topic is sensitive on a national level and can be regarded as a 'hot topic' (mainly at certain times in the year). An increasingly larger group of people regards this tradition as a painful memory of colonial history and a continuation of feelings of oppression and racism, while another group sees this figure as a harmless symbol of a festive children's event, experiencing criticism of this tradition as a threat to their identity. From a students' perspective, however, the sensitivity regarding Black Pete could be regarded as 'hot' and national compared to, for example, the more 'cooled down' and 'local' debate about Mussert's Wall.

The lesson started with a discussion on the current debate about Black Pete, with most students taking the position that the Black Pete tradition is not racist. The lesson did not include an explicit central question or concrete object (criteria 1 and 2). After the discussion, students were instructed to study sources (pictures of Black Pete) from different periods of time between 1880 and the present (criterion 3 and 4). The purpose of this exercise was to nuance their views. The sources were deliberated in a final round of discussion. The lesson included a lot of interaction between students, with the teacher passing on questions and answers and asking open questions (criterion 5).

After the lesson, teacher Roland indicated that he had not expected most students to appear to be in favour of keeping the Black Pete tradition. Compared to the lesson on Mussert's Wall, in which students at first glance did not understand why the topic could be seen as sensitive, this lesson seemed to contain little sensitivity because of all the students indicating that they had the same point of view. However, sensitivity did arise later in the lesson, when a student of Polish descent reacted emotionally after reading a comment made by someone on the Internet that stated that Black Petes should be replaced by Polish people. Afterwards, the teacher indicated that this needed a follow-up discussion.

In this lesson, the teacher only applied the design principles of the training to a limited extent. He clearly addressed interpretations of the Black Pete tradition that have changed over time, using different sources, but he did not use a concrete object or a central question. Nor did the teacher fully apply the principle of addressing multiple perspectives in three time-layers. It is possible that applying these principles would have brought sensitivities on the subject to the forefront earlier. While evaluating the lesson afterwards, Roland explained that he had started the lesson with a current and actual discussion and not with events in the past because he first wanted to know exactly what was going on in the minds of his students.

In her second-year classroom (13-14 years old students) teacher Nicole also chose the topic of Black Pete, partly at the request of some of her students. She started the lesson by making an inventory of the reactions to a photo of a Black Pete in the present; students were asked to put into words their associations with and questions about the photo. Thus, Nicole used a central object, namely a photo (criterion 1), but no central question to start off the lesson (criterion 2). In the discussion that followed, the teacher gave the floor to all students. Then students started working on the question of whether Black Pete is appropriate for the present day or not (criterion 2). To answer that question, they were given a text describing the probable origin of Black Pete. They could also look up information themselves on the Internet. This meant that attention was paid to one perspective from the past based on a historical source (partly covering criteria 3 and 4). In a closing debate, students were divided into groups tasked with arguing for or against using Black Pete in St. Nicholas festivities. The teacher ensured that students articulated their arguments (criterion 5). The students did not always adhere to their roles as supporters or opponents but tried their best to articulate their arguments and respond to each other.

In this lesson the teacher applied various design principles of the training, but did not incorporate a discussion of different perspectives from the past and present and in historiography. As a result, it was mainly the present-day debate that defined the lesson. However, the use of a historical source ensured that students also brought arguments into the discussion that revealed some insight into the dynamics of perspectives over time. In addition, the fact that proponents and opponents in the discussion did not always adhere to their assigned roles showed that there were more views on the subject in the classroom than the first inventory of associations suggested. If the teacher had addressed different perspectives in the three time-layers more strongly, these views might have been explicated earlier, so that they could have been discussed. Afterwards, the teacher indicated that she was very satisfied with the input from the students, precisely because she had allowed a lot of room for it at the beginning.

Experiences with the training

In the follow-up meeting with all three teachers, the fact that the students generally did not regard the topics discussed as sensitive was noted as a striking feature of the lessons. The teachers indicated that students do not always appear to see the sensitivity of a certain subject and noted that they sometimes stick to their own view, although they do develop a greater understanding of other perspectives. Partly for this reason, Roland expressed his intention to pay more attention to the feelings and experiences of his students in the future, while also devoting less time to present-day contexts. Nicole specifically related this to the use of an object, which she highlighted as a useful insight from the training. She thought it would be valuable to initially ask students what feeling this object evokes in them.

The teachers were interested in the historiographical approach of the museum working with sources about the time when an object was placed in the museum. However, teachers also indicated that they had difficulty in applying the concept of historiographical time to their specific topic. This had to do with difficulties in determining what time between the historical time and the present would be most interesting as a historiographical context. In addition, the teachers indicated that they were afraid that including multiple perspectives from all time-layers would make the lesson too complex for students. Ewald specifically mentioned the difficulty of not offering students too many sources while also wanting to do justice to as many perspectives as possible.

Overall, the three experienced teachers were positive about the tools offered by the training. This can be illustrated by their statements: 'Especially the apparent simplicity of the examples provided, to see what you can do with something so small' (Ewald). 'Practical tips that can be used at all levels. It also provides you with enough scope to interpret it in a way that suits the group' (Nicole). 'By experiencing a lesson on the 'developed' mummy myself, I have gained more self-insight. The PowerPoint slides provide a framework for lesson design and types of questions that can stimulate depth in the lesson' (Roland).

The student teachers reported that they regarded the principle of discussing multiple perspectives over time as a useful insight that they could apply in their lessons. Some indicated that they had become more aware of the sensitivities surrounding a subject and that the training had contributed to expanding their didactic repertoire. The idea of providing more space for students' opinions by discussing them in a safe and respectful way, the use of a concrete heritage object, and setting meaningful questions was seen as useful and lead to intentions to introduce multiple perspectives in their lessons.

To sum up, our results indicate that the training contributed to a sense of self-efficacy in teaching sensitive topics. In the observed lessons, teachers applied various design principles that were offered in the training. They used (heritage) objects and partly succeeded in exploring multiple perspectives trough time. Moreover, teachers appreciated the tools offered during the training and indicated that they gained more insight into discussing sensitive issues from multiple perspectives.

Conclusion and discussion

Research has shown that teaching about sensitive topics and acknowledging multiple perspectives is and remains challenging. Various training courses and interventions exist, but little is known about how they work in the classroom and whether a domain-specific approach could help history teachers to deal with sensitive issues proactively. In collaboration with museums and teachers, this study attempted to develop guiding principles for open discussion of sensitive issues, which were then tested in a teacher trainer course. The training focused on exploring multiple perspectives (of students and over time) related to a heritage object that reveals different and changing points of view in a tangible way. We evaluated this training in a small-scale monitoring study, to find out whether teachers and student teachers experienced self-efficacy when teaching about potentially sensitive topics. We also observed whether teachers applied the design principles of the training in their lessons.

Confidence to teach sensitive topics

Teachers indicated that the training provided them with insights and practical tools for discussing sensitive topics and they reported becoming more confident in teaching sensitive subjects. They mainly pointed to the design principles of showing multiple perspectives over time and using a concrete object as powerful tools to achieve this. Furthermore, the approach of allowing participants to first experience the design principles themselves appeared to generate greater awareness of the sensitivities surrounding historical topics.

Teaching practice

Some use of the principles demonstrated in the training was observed in the lessons of the three experienced teachers. Notably, only one teacher used a concrete object, while the other two teachers used different images. The lessons also differed in the use of a central question. All three teachers addressed different time periods in the lesson (by using sources), but multiple perspectives within these time layers were less represented. In particular, perspectives from historiographical time remained undiscussed. Probably because there was a lot of room for input from and interaction between students, the emphasis was mainly on the present time: how people in the present deal with the past.

The focus of this study was primarily on the experience and professional development of teachers. However, the ultimate goal is that through this process, students become more adept at taking a historical perspective, for which no data were collected in this study. What is notable, is that the precise nature and sensitivity of the topic discussed makes teaching historical perspective-taking challenging in various ways. From the approaches of the teachers we observed, it is evident that a subject like 'Black Pete' demands a more student-driven approach, where perspectives in the present, due to the contentious nature of the topic, require more time and attention, and the transition to the past is somewhat more challenging. In the case of a topic like national socialism, which seemed less sensitive to students, we observe a somewhat more teacher-driven approach and more room for historical contextualization.

The observations also suggest that allowing room for students' input could result in less diversity in perspectives in the lesson. Regarding 'hot' and somewhat abstract issues, students may be less inclined to ventilate an alternative opinion, resulting in less diversity of voices. This demands culturally responsive teaching, by teachers who know what emotions and stereotypes exist below the surface of a classroom (Siwatu, 2007; Tribukait, 2021). We assumed that focusing the discussion on a specific concrete object, in accordance with the design principles of the training, would have helped to facilitate the expression of more diverse perspectives, but further research with more teachers using concrete objects is needed. Additionally, future studies would need to include students' perspectives, and their learning outcomes regarding historical perspective-taking, as the handling of sensitive issues is to a large degree defined by the interaction between teacher and students.

Although historiographical points of view are difficult to teach, they are seen as valuable and domain-specific perspectives because they can 'take the sting' out of dichotomies that often characterize discussions (past/present; sensitive/not sensitive) by showing how the sensitivity of a topic changes over time. Teachers indicated that they wanted to practice more and give more lessons based on these principles to become more familiar with them. Adding more concrete, worked-out examples to the training could also help teachers to get a better idea of what is meant by perspectives from the historiographical period. Finally, teacher knowledge plays a major role, and it requires research skills to determine what objects could form an interesting starting point for discussion of a specific sensitive topic and what period would be interesting as historiographical time. The expertise of museum staff is of great value in this regard, because they often are more familiar with the story behind specific objects.

Opportunities and obstacles

The results of this small-scale case study appear to support previous research findings. Teachers sometimes have little confidence in their own knowledge when discussing sensitive topics, although they do not always avoid teaching them (Kleijwegt, 2016; Savenije & Goldberg, 2019). In addition, this study provides a direction for further research into the implementation of didactic approaches in practice.

Collaboration between museum educators, teaching methodology experts and history teachers seems promising, especially when it comes to sensitive topics and the use of concrete objects. History teachers and museum educators could make much more use of tangible heritage objects when discussing abstract and difficult themes. Concrete objects can evoke a response in every student and make differences between the perspectives of individual students visible and open for discussion (Savenije et al., 2014). If a teacher makes substantive and concrete choices, there is also more scope for students to reason historically and reveal their perspectives. In this study, a relatively short and simple domain-specific training appeared to offer teachers a handhold and to encourage them to teach lessons based on multiple perspectives in lower secondary vocational education.

Because of the small scale of the study, we should be cautious about drawing conclusions about the effectiveness of the training. It is uncertain to what extent this training would have substantial effects on teaching, especially when a teacher is taken by surprise by unexpected emotions and sensitivity in the classroom. Further research could investigate whether this approach (in which the teacher takes the initiative to raise a potentially sensitive issue) also offers tools for moments in lessons when teachers/students are confronted with sensitive issues.

The design principles of the training could be expanded into a powerful hybrid approach that could be used in different educational contexts: in museums, on location and in the classroom. Museums are not neutral participants in engaging with the past, which makes them excellent venues for showing students that multiple perspectives can converge and clash, even within these institutions. Other contexts could also be found through collaboration with other school subjects. Tangible and less tangible objects related to sensitive issues can, for example, be viewed from multiple domain-specific perspectives (Janssen, Hulshof & Van Veen, 2018). Themes such as dealing with death and homosexuality could, for example, be approached cross-curricular from a biological and historical perspective, while ideas about the role of women could be discussed from the perspectives of classical languages, social studies, and history. In addition, it would be interesting to investigate with students how the same information or facts are sometimes used as arguments for completely opposing perspectives. This broad approach could help students to become proficient in understanding the sensitivity of topics and in making an informed contribution to discussions themselves.

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APPENDIX 1: Observation Scheme

KEY QUESTION: THE TEACHER BUILDS THE LESSON AROUND A KEY QUESTION			
The lesson is built around a main question that is central to the lesson, namely:			
This question has been made explicit:	By the teacher		
	By the student(s)		
MULTIPERSPECTIVITY: THE TEACHER MAKES CLEAR THAT THERE ARE MULTIPLE PERSPECTIVES AND INTERPRETATIONS			
on the event / on the actor / on the phenomenon:	Perspectives of different historical actors (past)		
	Different historical interpretations over time (historiography)		
	Different interpretations in the present		
	One perspective from the past, through time and in the present		
	A single perspective or interpretation		
Shows that interpretations change over time			
Makes clear that the perspective presented is only one of many			
Asks historical questions to clarify the mutability of perspectives over time, namely:			
USES SOURCES TO CLARIFY PERSPECTIVES			
Uses 1 source at a time > what time(s)?			
Uses the same source over time			
Uses the source to illustrate a perspective			
Uses the source to substantiate a perspective			
Contextualizes the source			
Evaluates the usability/reliability of the source in relation to a specific question			
Compares different perspectives on the source over time			
Problematizes the current use of the source in a museum			
Asks historical questions regarding the source, namely:			
Interaction: THE TEACHER ENCOURAGES THE STUDENT TO REASON THROUGH INTERACTION AND BY ASKING QUESTIONS			
Encourages interaction:	Between students in class		
	Between teacher and student (Contributions from more than one)		
	By asking open questions		
	Geared to getting the students to put their own arguments into words		
Gives assignments that demand historical thinking and reasoning activities	Name/compare perspectives or interpretations		
	Analyse/evaluate historical sources		
	Ask historical questions		
	The students do not work on assignments		

Method: Tick each item that you observe and use the space on the right to add comments

Analysis and interpretation of an historical photograph among future teachers of social science subjects: Research using the eye-tracking method

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ABSTRACT

This article presents the findings of mixed-design research carried out in 2021 on a sample of students who were training to become teachers of social sciences subjects. The aim of the research was to determine the extent to which a carefully considered, didactically structured analysis of an iconographic historical source (an historical photograph depicting the occupation of Czechoslovakia by Warsaw Pact troops on 21 August 1968) influences the quality of the source's perception, analysis and interpretation. A computer test with a set of questions for the respondents (test subjects) was created as a research tool. The study used three methods of data collection and processing: audio recording analysis using open axial coding and categorization; eye-tracking to investigate the perception strategies of the test subjects; and structured interviews carried out with the test subjects following the test, in order to gain information about the course of the test and to indicate potential options for modifying the research tool. The results of the study showed that a didactically structured analysis of the iconographic source had a substantial positive effect on the students' perception strategies and the quality of their interpretation. If the test subjects are not guided towards a thorough observation of the image, identifying its individual elements and determining their meanings, they mostly overlook these important elements entirely, and their interpretation as a whole is very superficial. Another aspect of the source that is usually overlooked is the level of empathy, i.e. understanding of the individual experiences of the depicted people, bringing multiperspectivity in the perception of the depicted situation. These research findings should be taken into consideration during pre-graduate training for future teachers of social sciences subjects; graduates of teacher training degrees should possess these specific competencies and be able to implement didactically structured analyses and interpretations of historical sources in their teaching at primary and secondary schools.

KEYWORDS

Field-specific didactic research, Eye-tracking, Visual perception, Historical analysis, Historical image interpretation, Historical photographs, Teacher training students

Introduction

International discussions among experts regarding the aims, principles and content of history teaching in the post-communist countries have been underway for more than a quarter of a century, and these discussions are helping to encourage the teaching profession towards a deep-rooted transformation of didactic paradigms. In the initial phase, these discussions focused mainly on de-ideologizing the presentation of history, and they subsequently shifted to emphasizing the principle of multiperspectivity (Stradling, 2003). This development was accompanied by a gradual shift away from narratively conceived, synthetizing textbooks, dominated by the authors' interpretation of history, towards textbooks based on constructivist principles and focusing on the development of historical thinking competencies. An inquiry-based approach, widely used in various pedagogical fields such as natural sciences didactics, has also begun to be applied in humanities and social sciences education. In the Czech Republic, unlike some other countries (such as the UK, France or Germany), this approach is still in its infancy. The inquiry-based approach develops pupils' competencies in analyzing and interpreting various types of historical sources – not only texts, but also iconographic, audiovisual and other types of sources: works of visual art, photographs, caricatures, posters, advertising, documentary and fictional films, graphs and statistical tables, cartographic materials, etc. (Sauer, 2000; Pandel & Schneider, 2005; Labischová, 2008; Schnakenberg, 2012; Činátl & Pinkas, 2014; Beneš & Gracová, 2015).

Besides this competency-based concept of education, there has also been a visible shift on the level of content, especially in the increased emphasis on 20th-century history and contemporary history. The aim of school history teaching in this context is primarily to ensure that pupils understand key milestones and events in modern and contemporary history, and are able to evaluate them critically and compare various interpretations of them. In the Czech Republic, these changes have been reflected in the school curriculum; the revision of the *Framework Education Programmes for Primary Education* should be complete by 2024 (RVP ZV, 2005). Increasing emphasis is being placed on interdisciplinarity, specifically on the interconnection of history and social sciences (civic studies); this principle is also embedded in the Czech secondary education curriculum. Schools have the option to create an integrated subject on the level of the school curriculum entitled "People and Society", which integrates the content of history and social sciences teaching. This is nothing new; a similar model has been implemented with a fair degree of success for example at *Gymnasium*-type schools in Austria, where students attend the obligatory subject "Geschichte und Sozialkunde/Politische Bildung" (history and social sciences/political education). The integration of related disciplines is also accentuated in the dimension of field-specific didactics; the approach known as trans-disciplinary didactics focuses on integrated similar content and methodological approaches on the level of empirical research and on creating close interconnections with school practice (Janík & Najvar, 2011; Slavík et al., 2017).

However, the integrative concept of history and social sciences means that cross-cutting topics need to be incorporated into pre-graduate teacher training in order to ensure that future teachers will be able to teach the new-concept subjects with a high level of competence. This involves giving teacher training students a grounding in philosophy, political science, sociology, and (for future

history teachers) current political and social affairs; it also requires the incorporation of selected chapters from 20th-century history into the curricula of teacher training degrees for future teachers of social science fundamentals and civic studies. Besides providing a factual basis, it is also necessary to form and cultivate historical thinking competencies among future teachers of social sciences subjects, and their analytical and interpretative skills need to be systematically developed and enhanced. The analytical and interpretative models developed as part of history teaching didactics can be further modified and transferred to the educational content of social sciences subjects (e.g. a model originally developed for analyzing and interpreting a historical caricature can be modified and applied to present-day caricatures).

Theoretical basis

Visuality in history is investigated by a distinct area of historiographic research known as visual history. Here, iconographic historical sources are not viewed merely as a "supplement" to written or material sources; instead they are a subject of research in their own right (Paul, 2006; Handro & Schönemann, 2011). Visual sources (in history teaching, all visual didactic media) imbue knowledge of the contemporary world with a striking visuality, and they are an important type of material for the development of historical thinking competencies in pupils. They should not be used solely for illustrative, decorative functions (Mareš, 1995); instead, it is important that they should serve as effective carriers of historical information and historical knowledge.

When working with visual media, it is essential to didactically structure and guide iconographic perception, including a detailed description of individual elements and symbols. Research shows that if pupils perceive visual historical sources without any further information, their understanding is usually superficial or entirely erroneous; the teacher plays a crucial role in guiding pupils' perception and contextualizing the visual information within their system of prior knowledge – including judicious work with pre-concepts (Bernhardt, 2011, p. 46). It is also desirable to focus (usually by using catalogues of questions for pupils) on higher cognitive operations – analysis, comparison and interpretation, explanation of the historical and socio-political context, evaluation of the entire historical situation, characterization of the author's intentions and attitudes. Further key aspects are imagination, the development of empathy, the emotional level, aesthetic aspects, and the reflective nature of the entire analysis (Sauer, 2000; Pilarczyk & Mietzner, 2005; Lange, 2011; Labischová, 2020).

One type of material that can be widely utilized in the teaching process to support learning about 20th-century and contemporary history and to develop understanding of key events and processes is the historical photograph. This type of material documents not only important political events, but also other aspects; many historical photographs encompass psychological and social levels of meaning, capturing various social interactions, moments in working life, everyday life and leisure activities, family history, the history of childhood, fashion, the development of advertising, and more. In this connection, it is possible to apply one of the fundamental principles of historical education – the above-mentioned principle of multiperspectivity – as well as developing various aspects of historical empathy. Multiperspectivity is based on the assumption that no single historical narrative exists, and that historical events should be viewed from various perspectives (national, social, ethnic, political, cultural, gender). A multiperspectival approach to the same historical event and its evaluation contributes to a greater understanding of the past as well as an awareness of possible stereotypes in historical perception (Abbey & Wansink, 2022; Kropman, van Drie, & van Boxtel, 2019; Stradling, 2003).

A further important phenomenon is historical empathy. This enables us to empathize with the perceptions and experiences of people in the past, helping us to understand their emotions – though it is possible to maintain a certin distance, and we need not necessarily share those emotions. Historical empathy is not limited to the affective level; it also helps us to understand the motives that led to a particular action, behaviour, decision, or solution of a dilemma in various historical situations (Ellenwood, 2018; Lazarakou, 2008). Historical photographs offer considerable potential for developing historical empathy as part of history teaching.

Analysis and interpretation of historical photographs should focus not solely on their content, but also on their formal aspects and the means of expression used in them (e.g. black-and-white vs. colour photographs, light vs. shadow, perspective, interior vs. exterior, studio photographs vs. "spontaneous" moments, etc.). Other didactically beneficial aspects include various alterations of photographs, subsequent modifications, retouching and so on, as well as the purpose of these alterations, e.g. for use in propaganda (Labischová, 2020).

As has been stated above, there exist various interpretative models that can be used when analyzing and interpreting historical photographs in history teaching (Sauer, 2000; Pandel & Schneider, 2005; Schnakenberg, 2012). One example is Pandel's didactic model (Pandel, 2011, pp. 83–84), which comprises:

1. *Description and naming of elements and symbols* (who is shown in a photograph, how many people there are, what they are doing, their expressions and gestures, the place and time at which the scene took place).

2. *Meanings* (ethnic, social etc. affiliations of the people in the photograph, formal vs. informal relationships, their behaviour, the situational context).

3. *Documentary importance* (which historical event is depicted, whether it is a one-off or repeated event, who was or could have been the photographer, the purpose for which the photograph was taken, why this particular photograph is used in teaching/in a textbook).

4. *Narration* (narrate the story of the depicted moment, including what happened before and after the depicted scene).

This study presents the results of empirical research using the eye-tracking method, which is very useful for investigating mental processes of visual perception and cognition (in the case the analysis and interpretation of iconographic materials) by monitoring eye movements (Duchowski, 2007). This method was originally applied outside the education system, e.g. in military applications, driver training, marketing and advertising, cartography or kinanthropology. A useful basis for pedagogical research can be provided by cognitive psychology (Rehder & Hoffman, 2005; Vandeberg et al., 2013; Dogusoy-Taylan & Cagiltay, 2014). Educational research has so far focused its attention primarily on the process of reading (and related disorders), specific features of on-line teaching and e-learning, and processes of perception when engaged in learning tasks (Jamet, 2014; Kekule, 2014; Knight & Horsley, 2014; Persaud & Eliot, 2014). In history and social sciences teaching didactics, several studies have explored the research potential of the eye-tracking method by comparing didactically structured and unstructured analyses of historical sources, specifically caricatures in history teaching and pre-graduate teacher training (Labischová, 2018, 2019).

Research aims and methodology

The study presented here draws on previous research into the visual perception of historical caricatures. The main ***aim*** of the study was to determine whether there exist substantial differences in the quality of perception, analysis and interpretation of a historical photograph when carrying out a didactically unstructured learning task and a didactically structured task (using questions inspired by Pandel's interpretative model); the respondents (test subjects) were students training to be teachers of social sciences subjects.

Research design

The methodology used for the study was a mixed research design, combining qualitative and quantitative methods. Here the qualitative aspect is dominant; the quantitative aspect plays a supplementary role. The research tool used was a computer test carried out using a Tobii TX300 Eye Tracker machine with Tobii Studio software, consisting of one didactically unstructured question and a set of nine didactically structured questions guiding the test subjects in their analysis and interpretation of a historical photograph. The data analysis was carried out using the following methods:

- Audio recordings of the respondents' verbal answers were made. A literal transcription was made, and the answers were evaluated by means of open and axial coding, categorization and partial quantification of the data.

- Visual recordings made by the eye-tracking machine were evaluated (i) in the form of graphic depictions of the measurement results, and (ii) on the basis of statistical data and calculations (mean frequency and duration of individual eye fixations on precisely defined areas of interest). The graphic depicting incorporated (a) *gaze plots*, recording the trajectory of subjects' gaze and the positions of their individual fixations; (b) *heatmaps*, depicting the intensity of fixations using a colour scale on which red is the highest intensity and blue the lowest; (c) *gaze opacity maps*, on which the parts of the image with the most intense fixations are displayed in light shades while the places with the least intense fixations are dark.

- After completing the test, all the respondents (test subjects) reflected on the test via a structured interview whose main aim was to identify the test questions that were difficult or less comprehensible (if any) and to evaluate the proposed catalogue of test questions for pupils from a didactic perspective.

The test was based on a well-known photograph by Václav Toužimský, taken in the morning of 21 August 1968 in the Czech city of Liberec during the occupation of Czechoslovakia by Warsaw Pact troops (Figure 1). According to the photographer's memoirs, he took the photograph while standing on the roof of the city's photography centre and watching in amazement as a Soviet tank (no. 314) entered a covered arcade and collided with a pillar. The photograph captures the moment at which the tank crashed into one of the buildings lining the square. It is still not known what caused the accident; in Toužimský's opinion the tank driver may have momentarily fallen asleep or been under the influence of alcohol (Matyášová, 2014).

This particular photograph, Figure 1 (p. 6) was selected for a number of reasons. It depicts a scene from an important historical event; it captures a dynamic situation; and it shows a number of people behaving in various different ways (i.e. it is not a portrait photograph). It is also a photograph that is quite frequently used for didactic purposes, and it is featured in several history textbooks (Parkan et al., 2017, p. 123). Moreover, the situation depicted in this iconographic historical source offers opportunities for imagination; thinking about how the people depicted in the photograph experienced the events; and the creation of narratives.

Figure 1.

Czech city of Liberec, August 1968

Notes. Photographer, Václav Toužimský. The photograph has been cropped for the purposes of the test. Source: https://www.lidovky.cz/domov/pribehy-fotek-ze-srpna-68.A140820_214718_ln_domov_sm

The test itself involved looking at the photograph, reading the questions that were successively displayed on the computer monitor (with the photograph constantly visible), formulating verbal answers to the questions and saying the answers aloud. No time limit was set for answering.

The test consisted of ten questions:

1. What is depicted in the photograph?
2. Which historical event is it?
3. How did you recognize the historical event?
4. Why are there almost no cars in the street?
5. Does the tank have any special markings? Why?
6. How are the people in the foreground perceiving the situation?
7. Why are the people in the foreground looking on without doing anything?
8. What are the people at the right in the arcade experiencing?
9. What is the tank driver probably thinking?
10. How did representatives of Czechoslovakia react to the 1968 occupation?

The first question is a didactically unstructured, relatively general question. According to Bernhardt, this type of question is not ideal from a didactic perspective, and such questions often lead to a superficial, rapid glance at the photograph without any deeper understanding of its meaning (Bernhardt, 2011, p. 46).

The nine following questions comprise a structured didactic task based on general interpretative models. Question no. 2 is focused on the identification of the historical event (the occupation of Czechoslovakia by Warsaw Pact forces on 21 August 1968). Question no. 3 encourages respondents to situate the event within the context of their existing knowledge and to state which elements depicted in the photograph enabled them to identify the historical situation.

Questions nos. 4 and 5 encourage more detailed observation and explanation. Questions nos. 6–9 explore the psychological dimension, encouraging respondents to empathize and think about various motivations and causes of the depicted people's behaviour and experiences. The answers to these questions cannot be derived directly from the photographs; instead the focus is on historical imagination, which can be stimulated by appropriate questions. The answers may be inspired, for example, by the non-verbal behaviour of the people depicted (standing and looking on, walking past without showing much interest, running away through the arcade, etc.), and they can develop the respondent's imagination (What is the tank driver thinking? Does he actually know where he is? What effect does the civilians' behaviour have on him? Did he crash into the wall deliberately or by mistake?). The last question is likewise not directly related to the photograph, but requires a certain degree of knowledge related to the historical event.

The research was conducted in November 2021 in the eye-tracking research laboratory of the Faculty of Education, University of Ostrava (Czech Republic). The respondents were 18 students studying for a teacher training degree to become teachers of social sciences subjects. Students training to become history teachers were deliberately not included in the sample; the aim of the research was to determine the level of analytical and interpretative competencies in future teachers of related subjects, i.e. subjects which will incorporate interdisciplinary overlaps with history teaching. The respondents comprised 12 women and 8 men aged 20–24 who were training to become teachers of civic studies for primary schools in combination with training to become teachers of one other subject (mathematics, Czech language, English language, art education, physical education). The test lasted on average 10 minutes for each respondent. All the respondents received concise information about the form of the test and precise instructions on answering. Eye calibration was carried out before the test.

The testing complied with the basic ***ethical principles of pedagogical research***. All the test subjects signed an informed consent document prior to testing. They were informed about the aims and process of the research, and after the test they were able to see the results of their own test as well as the anonymized results for the entire tested group. The rules stipulated for the research process were complied with fully. Anonymity was assured, and the research data (the measurement data and transcripts of the audio recordings of the subjects' verbal answers) were stored in a password-protected computer. The names of the test subjects have been changed for the purposes of this paper.

Research results

The data collected as part of the research indicate that the eye-tracking method, in combination with the analysis of audio recordings and subsequent interviews focusing on the course and conditions of the test, can generate valuable information about the process of perception and cognition and about the different perception strategies used by respondents when interpreting historical sources – not only photographs, but also for example caricatures (Labischová, 2018) and other types of sources.

Analysis of audio recordings

Based on transcriptions of the audio recordings of respondents' verbal interpretations, open and axial coding, a categorial system was created. This system became the basis for the following phases of the research data analysis (Table 1).

Table 1

Proposed categorial system for the analysis and interpretation of a historical photograph, with specific examples of codes created during the analysis of the audio recordings of respondents' verbal answers

Category	Subcategory	Category designation	Description/content of the category, specific examples of codes
Historical event	Time	HU1	(21. 8.) 1968
	Location	HU2	Liberec, Czechoslovakia
	Description	HU3	occupation, invasion by Warsaw Pact (Soviet pact) forces
Elements of the photograph (detailed description)	People – appearance, outward manifestations of behavior	PF1	clothing, hair, hands in pockets, crossed arms, running away, standing
	Place and buildings	PF2	square, larger city, arcade, shops, (collapsing) wall, parking lot
	Objects and other	PF3	cars, motorcycles, bicycle, tram lines, tank (marked with a number and a stripe), signs (on shops), black-and-white photograph
People's experiences	People in the foreground	CH1	curiosity, passivity, doing nothing, surprise, waiting, dismay, powerlessness
	People in the arcade	CH2	panic, shock, fear (for lives), horror, feeling of danger
	Tank driver	CH3	obeying orders, unawareness, has wrong information (thinks he is liberating the country), regret, excitement, aggression, feeling of power, awareness of his mistake and fear of consequences, under the influence of substances (alcohol, drugs)
Broader historical context	Ideology	HK1	communism, socialism, reformist/conservative wings of the communist party
	Reaction of political representatives	HK2	powerlessness, passivity, consent (welcoming the arrival of troops), dissimulation (attempt to "smooth over" the situation), rise of conservative communists
	Reaction of the public	HK3	destruction of hopes, feeling of betrayal, emigration, passivity, active resistance among part of the population, aversion to Russians

All the subcategories in the categorical system presented above were quantified in terms of absolute frequencies. Graph 1 (p. 9) shows the differences in the quantitative occurrence of the individual codes between the didactically unstructured analysis (question no. 1 in the test) and the didactically structured analysis (questions nos. 2–10).

Graph 1

Comparison of absolute frequencies – Occurrence of subcategories (by code) in didactically structured and didactically unstructured analyses of the historical photograph
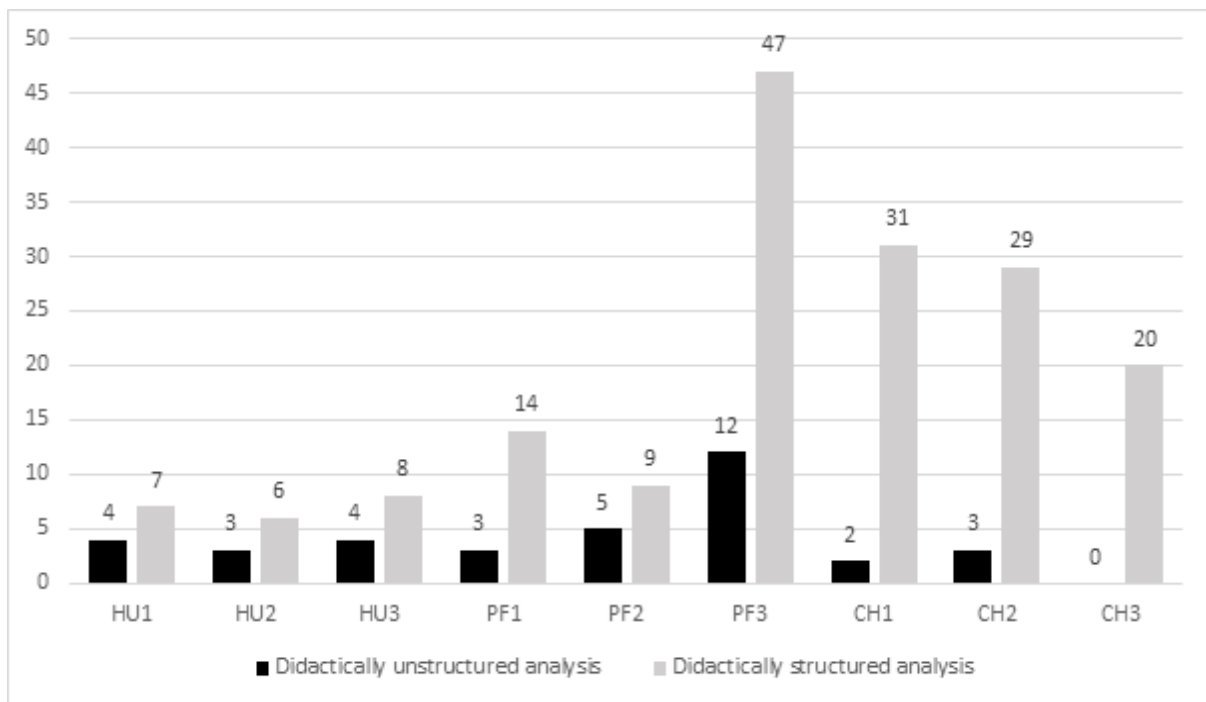
Graph 1 only shows categories HU, PF and CH because these categories were related to the direct observation of the photograph. Category HK (question no. 10 in the test) was not mentioned at all by the respondents in the case of the didactically unstructured analysis, and in the didactically structured analysis the frequency of occurrence of the subcategories was as follows: HK1 = 5, HK2 = 13, HK3 = 16. Comparing the occurrence of the subcategories for the other questions, it is evident that the occurrence was always substantially higher in the case of the didactically structured analysis – most strikingly in subcategory PF3, related to the detailed observation of the photograph (objects and other). There are also marked differences in subcategories CH1, CH2 and CH3, i.e. in the dimension of empathizing and imagining the experiences of the people in the foreground and in the arcade as well as the thoughts of the tank driver.

Focusing on the data collected from the answers to question no. 1, it can be stated that the didactically unstructured analysis and interpretation caused substantial problems for the future social sciences teachers. The respondents generally did not manage to correctly identify the historical event depicted, and one-third of them thought that it was a scene from the Second World War. Their observation of the photograph was very superficial; the most commonly mentioned element of the photograph was the tank which dominates the photograph. Questions nos. 2–10 were intended to guide the respondents, encouraging them to think more deeply about the photograph and to formulate more complex answers.

The combination of questions nos. 2 and 3 led to a more frequent recognition of the event depicted; this was aided by a thorough observation of the photograph and all the details depicted in it. Respondents most frequently mentioned the clothing and hairstyles, cars, the type of tank ("more modern than Second World War vehicles") and the shop signs:

> But it wasn't in Germany… When I look at it, I see the Czech sign *Sklo – porcelán* [Glass – porcelain], so it was in this country, I didn't see that before. (Robert)

In response to question no. 4 (about the reason for the absence of cars), students stated (with approximately equal frequency) the danger posed by military vehicles or fear of confiscation or damage, the prohibition of vehicles from entering the square, and the simple fact that car ownership was less common at the time. Question no. 4 proved particularly difficult (the markings on the tank). In the large majority of cases the students mentioned the number 314; only two respondents stated that the tank was marked with a white stripe to aid identification of the Warsaw Pact tanks.

Questions nos. 6–9 focused on multiperspectivity in interpretation (the different perceptions of the situation by the people standing and watching in the foreground, the people in mortal danger in the arcade, and the tank driver). In order to understand historical events, it is important to take into consideration not only knowledge, but also the affective dimension – the ability to empathize and to understand how the people involved would have experienced the events in different ways. The results of the study showed that teachers need to target this aspect of understanding, and to encourage and stimulate pupils to think in this manner.

Regarding the people standing in the foreground and looking on without doing anything, the respondents noticed that some of the people had their arms crossed or their hands in their pockets. The respondents mostly characterized these people's emotions as shock, surprise, curiosity, "paralysis" (in the sense of not knowing what they had to do), disappointment, dismay, and powerlessness (as civilians cannot do anything against military hardware that is clearly much more powerful than them). They repeatedly mentioned the "onlooker effect", noting parallels with the present day:

> If the photograph had been taken nowadays, those people would certainly have
> pulled out their mobile phones and captured the events. (Martina)

Regarding the people fleeing the scene of the collapsing wall after the tank's collision with the building, the answers most frequently mentioned panic, horror, shock, rapid escape, feelings of immediate danger, fear for life. The students' thoughts on the tank driver's experience are very interesting. Their answers diverge quite substantially. Some respondents thought that the tank driver must have been aggressive, aware of his superior power, enjoying his dominance, which excited him, or they stated that he was simply following orders. Other respondents thought about why the tank had collided with the building: the driver may have been under the influence of alcohol or other drugs, he may have crashed into the wall deliberately, or he may have made a mistake and was thus fearful of the consequences and the reaction of his superiors. Some of the students applied their prior knowledge of the historical event, and stated that the tank driver had been given incorrect information, so he did not know where he was and he thought that he had come to liberate the country.

Question no. 10 focused on the broader historical context and required a certain degree of knowledge of the historical event depicted. The respondents' answers did not distinguish much between the reactions of Czechoslovakia's political representatives and the reactions of the general public. With regard to the political representatives, they most frequently spoke about the destruction of the hope that had been engendered by the "Prague Spring", the end of Czechoslovakia's home-grown path of "socialism with a human face", subjection to the dictates of the Soviet Union, the retreat of the reformist wing of the communist party and the return of its conservative wing. With regard to the public, the respondents mentioned their immediate responses (reversing traffic signs, protest graffiti) as well as the longer-term consequences of the occupation (some citizens emigrated, others became dissidents, while others attempted to adapt to the new situation either in order to benefit their careers or simply out of fear).

The measurement with the Eye Tracker machine made it possible to record the precise length of time that the respondents devoted to each of the questions. Table 2 (p. 11) shows that there were no substantial differences in the answer times, so e.g. no gradual decline in concentration was noticed. The respondents spent the most time on the first and last questions.

Table 2

Average time spent observing the individual questions in the test (in seconds)

Question no.	1	2	3	4	5	6	7	8	9
Average time (s)	29.6	22.8	22.3	23.5	22.6	25.9	22.4	21.5	27.4

Note. Question no. 10 is not shown, as it does not relate directly to the observation of the photograph.

Analysis of visualized data

Visualized data collected by measuring with the Eye Tracker machine was generated, analyzed and subjected to comparison using heatmaps, gaze opacity maps and gaze plot maps to express the intensity of the respondents' gaze on the individual elements of the photograph, the course and frequency of their fixations, saccades and regressions. For selected test questions, areas of interest were monitored; these are specific areas of the photograph where respondents' gaze was concentrated or which were not looked at.

The results show substantial differences in the quality of perception of the photograph between the didactically unstructured analysis (question no. 1) and the didactically structured analysis (questions nos. 2–10). During the first question, the respondents' gaze focused almost exclusively on the central part of the photograph – the tank; this corresponds with the verbal answers that they gave. They briefly looked at the people standing in the foreground, but many of the respondents entirely overlooked the people in the arcade (at the right of the photograph) running away from the collapsing wall. This is evident from Figure 2 (the heatmap), and even more evident from Figure 3 (the gaze opacity map), which shows how a large part of the photograph remained a "blank", causing respondents to essentially ignore some of its important elements.

Figure 2

Heatmap (all respondents) – Question no. 1

1. Co je zachyceno na fotografii?

Figure 3

Gaze opacity map (all respondents) – Question no. 1

By comparison, the didactically structured questions encouraged the respondents to observe the photograph much more carefully and to focus their attention on various parts of the image. It should be pointed out that this concerns primarily questions nos. 3, 4 and 6–9, which encouraged the respondents to look at individual elements within the photograph (cars, the people in the foreground, the people in the arcade, the tank driver). By contrast, question no. 10 was not directly related to the observation of the photograph, instead requiring respondents to possess a degree of prior knowledge; here their gaze "wandered" in a highly random manner, often entirely outside the image.

Figures 4–6 present different variants of the data visualization (gaze plot map, gaze opacity map, heatmap). The gaze plot map makes it possible to visualize the course and progression of saccades and fixations, i.e. to identify the perception strategy chosen by each individual respondent, including which elements the respondent's gaze focused on first, which elements they focused on next (this progression is marked with numbers), and which elements the respondent's gaze returned to; the size of the circles indicates the differing durations of the fixations. For example, Figure 4 (for question no. 3, i.e. how the respondents recognized the historical event) shows that the respondent Vanda focused her gaze primarily on the central part of the photograph, but she then transferred her attention to the people in the foreground, and to a lesser extent to the people in the arcade. She hardly looked at the topmost part of the photograph, where there are no people (only broken windows), nor did she notice the shop signs.

The gaze opacity map (Figure 5 – for question no. 4, i.e. why there are hardly any cars in the street) shows that in this case the respondents looked carefully at the entire area of the square. The heatmap (Figure 6) likewise shows that the question (question no. 6, i.e. how the people in the foreground are perceiving the situation) substantially influences the progress of the respondents' gaze and encourages them to focus in more detail not only on the central part of the image.

Figure 4

Gaze plot map, example from one respondent (Vanda) – Question no. 3


Note. Unlike the heatmaps and gaze opacity maps, the gaze plot map cannot practically be displayed for all the respondents together, as the differently coloured circles denoting individual fixations would overlap and cover each other and the resulting image would become impossible to interpret.

Figure 5

Gaze opacity map (all respondents) – question no. 4

Figure 6

Heatmap (all respondents) – Question no. 6
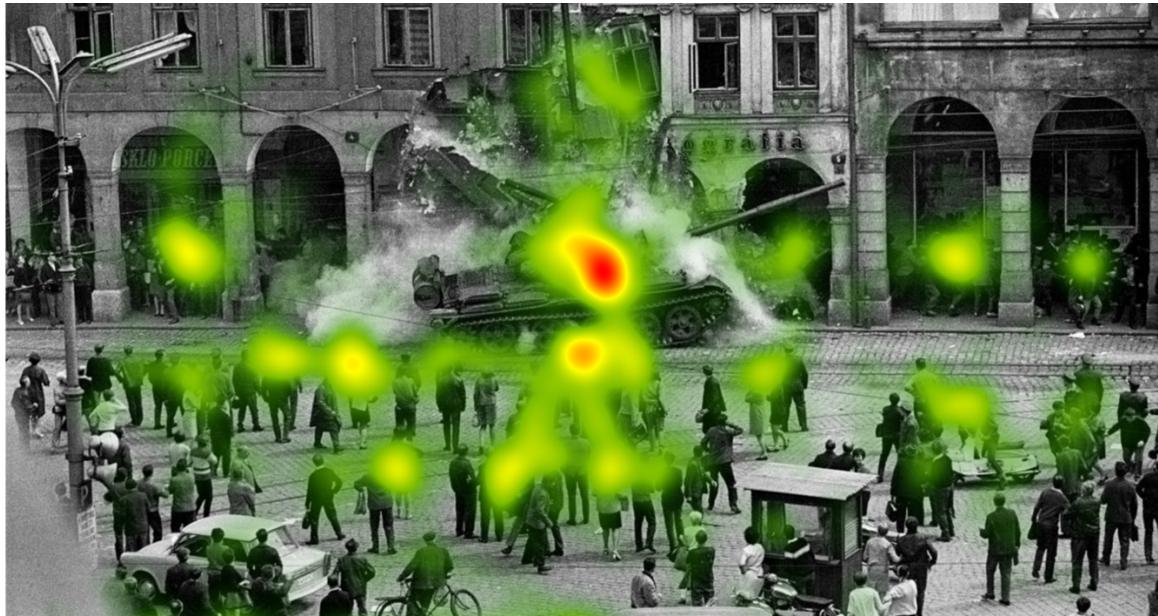
Reflections on the test

The final reflection on the testing process was conducted in the form of a structured interview with all the respondents, who expressed their opinions on the following:

- Which question they considered the most difficult;
- Whether any of the questions were less comprehensible (or incomprehensible) to them;
- Whether the set of structured questions (nos. 2–10) helped them to observe, understand and interpret the photograph better than the first question did.

   Most of the respondents stated that the most difficult questions were the identification of the historical event (as it could be confused with the Second World War) and the reaction of Czechoslovakia's political representatives (as the answer required a broader knowledge of the historical context). Some of the respondents stated that they had problems with the question about the tank's markings. A recurring response concerned the difficulty of guessing what the tank driver was probably thinking:

> The most difficult one was about what the tank driver was thinking. Putting myself in the tank driver's situation as he just drove in there and demolished it. (Daniela)

> Because it's difficult to put yourself in the tank driver's position. When you put yourself in the position of somebody who's in the street, you can say how you'd react. But the idea that I'm inside a tank and harming somebody – I'm not capable of empathizing with that. (Andrea)

      All the respondents stated that none of the questions were incomprehensible to them, and that the structured analysis was of great assistance in helping them to concentrate on details, orient themselves better within the photograph, and think more deeply about the various levels of the photograph, including empathy and the experiences of the people depicted in it:

> I looked at the parts of the photograph that I'd not looked at previously. (Jakub)

I noticed things that I didn't see at first sight. (Marika)

In the third question I realized I should look properly at the shop signs. (Robert)

In the first question I just looked at the whole image, but in the other questions I thought about it differently. (Helena)

It helped me to notice better what was happening there; thanks to how it was presented, I always just focused on one part of the photograph. (Andrea)

Gradually, as I went through the questions, I focused more on the situation and I thought more about it. It moved me forward in a way. (Daniela)

When I first saw the photograph, I didn't really know, but as the questions progressed, I thought more about it and began to see other things in it that I could interpret. (Michaela)

Conclusion

In conclusion, it can be stated that among university students there exist substantial differences in the quality of perception, analysis and interpretation of iconographic historical sources depending on whether they are set didactically unstructured or didactically structured tasks. In the first case (unstructured tasks), the respondents' answers are much more superficial; they overlook important details in the image, do not explore its various levels of meaning, and do not notice its psychological aspects (e.g. the experiences and motivations of the people involved). By contrast, an appropriately selected catalogue of questions guides the analysis and interpretation, encouraging respondents to think more deeply, empathize with the participants, and situate the photograph in its historical context. These findings correspond with the results of other studies (Bernhardt, 2011; Labischová, 2018, 2019), and they could potentially represent one of the important evidence-based foundations for innovations in pre-graduate training for future teachers. In the author's opinion, if future primary and secondary school teachers are to develop their pupils' analytical and interpretative competencies, it is essential that they themselves should possess these competencies – and so university-level teacher training should place greater emphasis on these aspects.

The findings of the study presented in this paper also suggest that the eye-tracking method, which has so far not been widely applied in research of history and social sciences teaching didactics, makes it possible to investigate the perception strategies used by respondents (pupils, students, teachers), and to identify the most intensively observed parts of a photograph as well as the parts which are observed less intensively or not at all. Questions prepared by teachers or didactic experts can thus encourage pupils to focus on these areas. The potential uses of the eye-tracking method are much wider, ranging from comparative studies of textbooks and their psychodidactic properties to pupils' perception of cartographic materials and various types of historical sources as well as the perception of art works and museum exhibits. Besides further subject-specific didactic research using the eye-tracking method, it will also be important to carry out research among students who are training to be teachers, in order to determine how they think iconographic sources can be used in their future teaching, what goals they plan to set, which competencies they intend to develop in their pupils, and which teaching methods they will apply for this purpose.

Acknowledgements

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Student teacher professional growth on teaching historical thinking and reasoning: A case study on the use of an observation instrument

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ABSTRACT

In this study, we investigated the role of an observation instrument on teaching historical thinking and reasoning (HTR) in fostering teachers' capability to teach historical reasoning. The aim was to see how Teach-HTR, an observation instrument that focusses on teacher behaviour when teaching HTR, can be used to enhance the professional growth of history student teachers in its teaching. We conducted a case study focusing on teacher training where a teacher educator integrated the use of the instrument in his regular practice. After investigating the changes in student teachers' beliefs, knowledge and practices by conducting pre- and post-measurements we used the Interconnected Model of Professional Growth to examine it further. The case study shows the Teach-HTR observation instrument helps student-teachers identify the teacher behaviour that enhances the teaching of HTR. It provides indications of the instrument's utility in enhancing professional growth.

KEYWORDS

History education, Teacher education, Historical thinking

CITATION

Introduction

The training of history teachers is a multifaceted process and is, in fact, a life-long enterprise. As teachers develop professionally, they build up their pedagogical content knowledge (PCK), i.e., their knowledge of how to teach their subject (Shulman, 1986). Regarding the PCK of history teachers, an understanding of historical thinking and reasoning and how to teach it is important. Despite historical thinking and reasoning (HTR) having received growing attention in the literature during the past two decades, less is known about how teachers can learn to teach it. Here, we investigated the role of an observation instrument on teaching HTR in fostering teachers' capability to teach historical reasoning in the classroom. Earlier, we developed and tested this observation instrument, Teach-HTR, which recognizes the teacher behaviour that promotes historical thinking and reasoning (Appendix 1; Gestsdóttir et al., 2018). The instrument is primarily intended to support teacher education and professionalisation but can also be used by researchers who want to investigate how and to what extent teachers teach historical thinking and reasoning. It contains 7 items, operationalized in 33 indicators and examples of teacher behaviour. A possible way of using this instrument may be in the initial training of history teachers. Observation instruments can be particularly useful when aiming at teaching higher order skills such as HTR, since research has shown that teaching HTR is a challenge, even for experienced teachers (e.g., Miri et al., 2007). Observations can result in concrete examples of effective teaching strategies, which contribute to teachers' pedagogical content knowledge and challenge teachers to develop their own teaching methods.

The aim of this study is to investigate whether and how the observation instrument Teach-HTR can be used by preservice history teachers to promote their professional growth regarding teaching HTR. Student teachers differ considerably from experienced teachers in regard to pedagogical content knowledge, a prerequisite for teaching HTR (Achinstein & Fogo, 2015; Harris & Bain, 2011). The process of the case study lays emphasis on cooperative procedures, considered appropriate for teacher education (see e.g. Johnson & Johnson, 2017). We use the Interconnected Model of Professional Growth (Clarke & Hollingsworth, 2002), which has been used in several studies of professional development (Bijsterbosch et al., 2019; Schipper et al., 2017), to examine changes in student teachers' beliefs, knowledge and practices. Our research question is: How can the use of the observation instrument Teach-HTR enhance the professional growth of history student teachers in the teaching of historical thinking and reasoning?

Theoretical framework

Teaching historical thinking and reasoning

Moving away from what may be labelled as 'traditional' history teaching, which focuses on students being able to recall historical facts, is a challenging task for many teachers. Teaching HTR is a complex task, as our analysis of history lessons on whether and how historical thinking and reasoning is being taught confirms (Gestsdóttir et al., 2019; Gestsdóttir et al., 2021). The interpretative nature of history calls upon higher order thinking skills. Students need to be able to take multiple historical perspectives into account, make use of primary sources, establish historical significance, discern continuity and change and other factors that regard history as a human-made product rather than a fixed historical truth (cf. Chapman, 2011; Lee & Shemilt, 2004; Seixas & Morton, 2013; Stradling, 2003, Van Boxtel & Van Drie, 2018; Van Drie & Van Boxtel, 2008). We use the term 'historical thinking and reasoning' for this type of activity. Historical

thinking and reasoning both aim at understanding the past, but historical thinking activities (as conceptualized by, for example, Lee, 2005; Levesque, 2008; Seixas & Morton, 2013; Wineburg, 1991), such as discerning aspects of change and continuity or contextualization of a primary source do not necessarily involve the construction or evaluation of a reasoning. Historical reasoning is a more integrative activity including both historical thinking and argumentation and aims at reaching justifiable conclusions about processes of continuity and change, causes and consequences, and/or differences and similarities through the analysis and critical evaluation of historical interpretations and primary sources (Van Boxtel & Van Drie, 2018). In a reasoning one constructs arguments to support assertions about the past (and addresses possible counterarguments) (see also Leinhardt et al., 1994; Monte-Sano & De La Paz, 2012; Voss & Carretero, 1998). In addition to being quite demanding for students, fostering these ambitious goals by active teaching methods is not in line with the emphasis on teacher centred teaching and lecturing, which seems to be the preferred approach of many history teachers in, for example, the United States and Europe (Reisman & Enumah, 2020; Wiggins, 2015). Teachers may be positively disposed towards teaching HTR but nevertheless find it problematic to enact and struggle with finding concrete ways to include the teaching of HTR in their usual practices (c.f. Barton & Levstik, 2003; Reisman, 2012; VanSledright & Limón, 2006). Some need assistance to realize what they are actually doing when teaching a class, having rarely tried to analyse or verbalise their own teaching (Voet & De Wever, 2016; Wansink et al., 2016; Wilson, 2001). More knowledge is needed on how teachers can be supported in teaching HTR during their initial training. The international information is sparse and leaves room for conjecture (Van Hover & Hicks, 2018).

The interconnected model of professional growth

Changing teaching practices towards more of an emphasis on teaching HTR requires professional growth. In their Interconnected Model of Professional Growth, Clarke and Hollingsworth (2002) describe professional growth as changes to any of the following four domains: 'the personal domain (teacher knowledge, beliefs and attitudes), the domain of practice (professional experimentation), the domain of consequences (salient outcomes), and the external domain (sources of information, stimulus or support).' (Clarke & Hollingsworth 2002, p. 950). As all the domains are interconnected, changes that occur in any of them may influence the others, through reflection and enactment. Hence, the model cannot only facilitate the investigation of change in (student-)teacher knowledge, beliefs and attitudes towards teaching historical thinking and reasoning but also address potential sources for this change (from information sources, enactment/trying out new methods in the classroom or reflection). In a previous study, we focussed on the personal domain when we investigated teacher beliefs that influence experienced teachers' choices of teaching approaches with regard to HTR (Gestsdóttir et al., 2021). In this study we continue by being mainly concerned with the personal domain but related to the domain of practice and the external domain. We want to see how an observation instrument can play a role in student teacher's professional growth, for example by supporting professional experimentation with teaching HTR in the classroom and informing teachers about HTR and how to enhance it in students. The domain of consequences is largely disregarded due to the design of the study, further explained in the methods section.

The elements ascribed to the personal domain are often collectively known as pedagogical content knowledge (PCK). A widely used definition of PCK, adding to Shulman's conceptualization, discerns five components (Magnusson et al., 1999): a) orientation towards teaching, b) knowledge and beliefs about the curriculum, c) knowledge and beliefs about students' understanding, d) knowledge and beliefs about assessment and e) knowledge and beliefs about instructional strategies. Several studies have taken a closer look at the PCK of history teachers, notably Tuithof et al. (2019), whose literature review revealed that most studies focus on instructional strategies, followed by teaching orientation. Instructional strategies were also the focus in Monte-Sano's (2011) case-study, where the aim was to teach novice teachers how to teach interpretative and evidence-based thinking. She concludes that a strong disciplinary understanding of history speeds

up the development of a teacher's PCK. Teachers who approached history as an interpretative and evidentiary discipline were more likely to attend to those attributes of student learning. The PCK element regarding student understanding is particularly challenging for less experienced teachers; Waldis, Nitsche and Wyss (2019) discovered a lack of PCK for more than 200 preservice history teachers who 'commented largely on generic teaching strategies while hardly noticing student learning.' (p. 112). Reisman and Fogo (2016) showed that the quality of instruction is constrained by the teacher's limited subject matter knowledge and PCK. It seems fair to conclude that to be able to teach HTR, student teachers need assistance to develop their PCK. An observation instrument can be of assistance in this respect.

Observation instruments in teacher education

The long-standing tradition of classroom observation in teacher training has usually been aimed at evaluating the performance of teacher candidates, however a complicated task that may be (Darling-Hammond et al., 2012, Gestsdóttir et al,. 2018). Gosling (2002) described three models of peer observation of teaching: evaluation model, development model, and a peer review model which purpose is 'engagement in discussion about teaching; self and mutual reflection' (p. 5). Peer observation of teaching is recognized at all school levels as an important factor in professional development, as the study of Drew et al. (2017) bears out. They reviewed observation instruments in use in Australian universities for various purposes, among them, to enable reflective practice. Few domain specific instruments are in use but among them is the observation of the mathematical quality of instruction that aims at the professionalization of math teachers (Learning Mathematics for Teaching Project, 2011).

In the domain of history teaching, Huijgen et al. (2019) used an observation instrument to investigate how teachers promote historical contextualization (Huijgen et al., 2019). They concluded that teachers tend to demonstrate contextualization rather than promoting student's capacity to do it themselves. Reisman and Enumah (2020) performed a case study where they investigated whether the use of classroom video to identify opportunities for student discourse could enhance teacher understanding and facilitation of historical discussions based on documents. They detected a positive relationship between the two skills, identifying the aforementioned opportunities and the capability to enact such discussions. Video viewing was used in a study to assess the PCK of preservice teachers (Waldis et al., 2019) and when describing quality history teaching (Gautchi, 2015). The literature on video viewing in initial or in-service teacher training describes several objectives in its use: '(a) show examples of good teaching practices, (b) show characteristic professional situations, (c) analyse the diversity of classroom practices from different perspectives, (d) stimulate personal reflection, (e) guide/coach teaching, and (f) evaluate competencies' (Gaudin & Chaliès 2015, p. 47). These objectives can be linked to the personal domain and the domain of practice of the Interconnected Model of Professional Growth.

The observation instrument Teach-HTR is an external source that informs teachers about HTR (what it is in terms of concrete activities, e.g., contextualizing, identifying causes and consequences and sourcing) and about instructional strategies (communicating objectives related to HTR, demonstrating HTR, using sources to support HTR, promoting multiperspectivity, providing explicit instructions on HTR, actively engaging students in assignments or whole class discussion that ask for HTR). The observation instrument is based on literature on historical thinking (e.g. Lee, 2005; Levesque, 2008; Seixas & Morton, 2013; Wineburg, 1991) and historical reasoning (e.g. Leonhardt et al., 1994; Monte-Sano & De La Paz, 2012; Van Boxtel & Van Drie, 2008; Voss & Carretero, 1998), Van Boxtel and Van Drie's empirically grounded model of historical reasoning (2018) and a consultation of experts from different countries (Gestsdottir et al., 2018). Therefore, it may contribute to a) the teachers' knowledge about HTR and the teaching of it, as well as beliefs about the importance of teaching HTR, b) professional experimentation/enactment of teaching of HTR, c) reflecting on their own teaching strategies/their own teaching of HTR and d) reflecting on students' ability to engage in HTR/the

development of this ability. Thus, the instrument brings together the external domain, the domain of practice and the personal domain of the Interconnected Model of Professional Growth.

Method

A case study was conducted in the context of teacher education in the Netherlands. The study is an exploratory qualitative one (Miles & Huberman, 1994), meant to gather information and indications of how the observation instrument Teach-HTR enhances the professional growth of history student teachers in the teaching of historical thinking and reasoning. As is characteristic for case studies, we combine different methods. We gathered data by using student teachers' lesson plans, questionnaires, learner reports, peer observations, reports of post-observation discussions and an interview with the teacher educator to facilitate triangulation (Yin, 2009). The Interconnected Professional Growth Model guided our description of students' professional growth and the contribution of using the observation instrument.

The project was approved by the Ethics Review Board of the University of Amsterdam, (2019-CDE-10376).

Participants

Participants were a history teacher educator from our network and their seven Master's students in history teaching at a Dutch university. The participating teacher educator, holding a PhD in history education, had extensive experience both as a teacher educator and as a history teacher. The teacher educator decided how the instrument could be integrated in a course on subject specific pedagogy (Dutch: vakdidactiek) at the final stages of the training program. Since the teaching of historical thinking is required in the Dutch curriculum, students had already devoted at least six lessons to it in their coursework before the study, as well as touching upon it in previous courses.

Procedure

The student teachers discussed the Teach-HTR instrument in a meeting before they used it to design and teach one lesson during their inservice training in secondary schools focusing on aspects of HTR included in the instrument. Their pupils were 13-15 years old, preparing for college or university. The lesson was reflected on by themselves, and observed by another student, using the instrument to analyse it. It should be noted that the participants did not receive extensive training in using the instrument to analyse other teachers' lessons which excluded the possibility to use these peer observations to draw conclusions regarding the student teachers' teaching of HTR and the HTR of their students. Pre- and postquestionnaires were used to investigate student's ideas of HTR and their perception of their ability to teach it before and after. The students also had group discussions with their teacher educator when all of them had accomplished their teaching of the lesson. Figure 1 shows an overview of the program.

Figure 1

An overview of the training program

Pre-measurement (January)	**Teaching** (Jan-Feb)	**Observing** (Jan-Feb)	**Discussing** (March)	**Post-measurement** (March)
Questionnaire measuring task value and self-efficacy for teaching HTR. Students explain what they can do to teach HTR.	Discussion of Teach-HTR ↓ Designing a lesson plan to teach HTR ↓ One lesson in secondary school taught, observed by a peer ↓ Reflection on the teaching of one lesson.	Observation of a peer, teaching HTR. ↓ Peer's written feedback and discussion of the lesson, using Teach-HTR.	Lessons and observations discussed in a course meeting with teacher educator.	Questionnaire measuring task value and self-efficacy for teaching HTR. Students describe what they have learned. Learner Reports.

Data collection and instruments

The program lasted from January to March 2020. All data were collected by the teacher educator at the university.

Knowledge and beliefs (personal domain): The pre-measurement included an open question asking student-teachers to list as many things as possible that they, as teachers, were able to do to enhance pupils' HTR abilities. Both at the beginning and the end of the training program students completed a task value questionnaire measuring the value that they attach to learning how to teach HTR and how interesting it is. The questionnaire consisted of three items: a) I think I will be able to use what I learned about the teaching of HTR in my lessons, b) I enjoy teaching historical thinking and reasoning in my lessons and c) understanding how to teach historical thinking and reasoning is very important to me. These items were adapted from a longer list of items measuring task value from the motivated strategies for learning questionnaire (MSLQ) (Pintrich et al. 1991). A 7-point Likert scale was used.

Student teacher's perceived competence (self-efficacy) for teaching HTR was measured before and at the end of the program (inspired by Voet's and De Wever's (2016) questionnaire on inquiry-based learning in history). The first item was a general item using a 7-points Likert scale: I expect to do well on the teaching of historical thinking and reasoning. This was followed by eight questions, each of which aligned with a category in the observation instrument, e.g., 'At the moment, to what extent do you feel able to formulate learning objectives that focus on historical thinking and reasoning?' and 'At the moment, to what extent do you feel able to make clear that there are multiple perspectives and interpretations?' These were measured on a 5-points Likert scale. Furthermore, in the post-measurement we included a question in a learner report-format to gain more insight in students' experiences when teaching HTR ('It was a challenge for me to …'). This format is useful when identifying educational objectives that are difficult to measure (Janssen & Rijlaarsdam, 1996; Van Kesteren, 1993).

Professional experimentation (domain of practice): We collected the lesson plans designed by the student-teachers, students' written reflections on the lesson taught, the observations of a peer

who observed this lesson using the observation instrument and the written feedback of the peer student (summarizing their findings including strengths and points of improvement). One question in the learner report-format was aimed at this domain ('The basic content of what I have learned is ...').

Sources of growth: The post-measurement included two questions in a learner report-format to gain more insight into sources of professional growth ('From the Teach-HTR instrument I learned ...', 'I learned the most from ...').

After the program, one of the researchers had a final retrospective interview with the teacher educator. In this interview, the teacher educator described and reflected on the course meeting in which the use of the observation instrument was discussed by the student teachers. Furthermore, the interviewer asked some clarification questions about the lesson plans of individual students and how they had made use of the observation instrument when designing them. This information was helpful in interpreting the data collected from the students.

Data analysis

For the closed questions measuring task value and self-efficacy mean scores were calculated. The open question in the pre- and post-questionnaire about enhancing pupils' HTR was coded by items present in the Teach-HTR instrument, to determine which aspects or components of HTR were addressed. An example is one student-teacher's explanation of how he might contextualize new historical knowledge and help pupils use argumentation appropriate to the time period being studied. In addition, they were coded to identify types of teaching behaviour, such as working with sources or asking historical questions. The learner report-questions in the postquestionnaire were analysed to discern the main challenges and sources of professional growth. Among them were making HTR concepts concrete, and learning from observing the lesson of a peer and using the instrument. The lesson plans were analysed, searching for components of teaching HTR (as operationalized in the observation instrument) in the lesson goals, as well as in the teacher and pupils' activities. Peer lesson observations, followed by written reports of post-observation discussion were used to get a clearer idea of the lessons the students designed and how they enacted them.

Results

First, the general results of all participants will be discussed, after which we focus on two of them, Joke and Jan (pseudonyms were assigned). They were chosen as certain opposites because initially, Joke was considerably less confident than Jan, who was of the opinion that teaching HTR was simple and did not necessarily require specific attention. Their experiences were different, so it was interesting to compare their development as history teachers.

Change in the personal domain

The questionnaires presented information on the students' beliefs, knowledge and attitude, i.e., the personal domain. The scores of all student teachers' responses are presented in Table 1. Looking at the overall means, the value students gave to learning about teaching HTR stayed the same in the pre- and postmeasurement, i.e., 5.9 out of 7 points. Student 2 (Joke) and 4, however, demonstrated a clear increase. The self-efficacy of four students towards teaching HTR increased. One student (Jan) showed a decrease in his self-efficacy. With respect to the open question in the premeasurement, we found that the student teachers were able to mention 0-4 items of HTR (av. 2.3) and 2-4 types of teacher behaviour (av. 3.1). Most often, they mentioned working with cause and consequence but as to teacher behaviour, giving assignments to pupils was mentioned most frequently. The basic content of what they had learned was how to make explicit steps towards teaching HTR, according to the learner reports ('The basic content of what I have learned is how

to incorporate HTR into your lessons even more and expand your toolbox in extending HTR to pupils.').

Both Joke and Jan were of the opinion that it was important for them to learn how to teach HTR, assigning 6 (Joke) and 7 (Jan) points to the statement, similar to the rest of the students. Joke and Jan gave the same responses to how important it was to them to understand how to teach HTR and its usefulness. Their answers differed on how much they enjoyed teaching HTR. Joke was more positive than Jan (6 vs. 5 points) and more interested in learning to teach HTR (6 vs. 5 points). However, she was less confident regarding being able to use what she learned about the teaching of HTR (5 vs. 7). The postquestionnaire revealed that all Joke's scores increased, signifying a change in the personal domain, except for one that stayed the same ('I think I will be able to use what I learned about the teaching of HTR in my lessons.'). In the postquestionnaire, Joke assigned 7 points to both how much she enjoyed teaching HTR and to the importance of understanding how to teach HTR. Jan's response to how much he enjoyed teaching HTR stayed the same (5 points) in the pre- and postquestionnaires. His view of the importance of understanding how to teach HTR decreased from 7 points to 5.

Regarding teacher knowledge, Joke mentioned working on historical empathy, causal reasoning and contextualization. She referred to three types of teacher behaviour: working with sources, assignments and explicit teaching of cause and consequences. Jan described causal reasoning, change and continuity, historical perspectives and the evaluation of sources. He linked them to four types of teacher behaviour: lecturing/asking questions, assignments, working with sources and providing explicit instruction on skills. He also expressed the view that explicit attention was neither required to cover HTR nor is it complex, since HTR is a natural part of historical narratives.

Joke felt an increased ability to provide explicit instruction on HTR skills and engage pupils in HTR through individual and group tasks (from 2 (unable) to 4 (able)). Moreover, she now felt completely able to use historical sources to support HTR. Nevertheless, her confidence towards formulating learning objectives that focus on HTR and engaging pupils in HTR by a whole class discussion diminished from 4 to 3. Jan's perception of his ability to teach HTR was very pronounced. In the prequestionnaire, he was the only student who felt completely able (5 points) to carry out all the items in question. He was also the only student whose confidence diminished according to the postquestionnaire.

Table 1

Mean scores of student teachers' answers in pre- and post-questionnaires

	Value (range 1-7)		Self-efficacy (range 1-5)	
	Premeasurement	Postmeasurement	Premeasurement	Postmeasurement
Student 1 Joke	5.3	6.3	3.4	3.9
Student 2 Jan	6.3	5.0	5.0	4.0
Student 3	5.3	5.3	3.8	N/A
Student 4	5.7	7.0	3.4	3.8
Student 5	5.7	4.7	3.8	4.4
Student 6	7.0	6.0	4.0	4.4
Student 7	6.0	7.0	4.0	4.0
Mean	5.9	5.9	3.9	4.0

Change in the domain of practice

Professional experimentation belongs to the domain of practice. The results described here are based on lesson plans. We also use the learner reports to discern possible change. The analysis of all six lesson plans showed the following: Four included HTR in their lesson goals (i.e., multiperspectivity or sourcing strategies) and all planned to engage their pupils in activities that asked for various elements of HTR, to various degrees (category 6 of the observation instrument). All but one planned to demonstrate HTR (category 2), a form of teaching HTR that has been most observed (Gestsdóttir et al., 2019). Thus, their lessons seem to justify the increased confidence the students had towards teaching HTR. The peer observations revealed even more elements of HTR, but these are not included here, as the students were not specifically trained in using the instrument that way. According to the learner reports, the students added many elements to their teaching during the program, such as giving explicit instruction on how to think and reason historically (Jan) or how to work with sources to enhance HTR (s7).

As already mentioned, Joke's confidence towards formulating HTR learning objectives and engaging students in HTR through whole-class discussions had somewhat diminished during the program. However, her lesson plan and lesson show that she demonstrated many behaviors that we include under the teaching of HTR. Joke chose a lesson on social and political issues of the 18th and 19th century, including an assignment focussing on the historical significance of events and circumstances using the diamond nine approach (Chapman, 2003). Part of the assignment was 'Name the event you have put at the top of the diamond. Explain why you consider this event the most significant one.' According to the observation of her peer, Joke managed to include many elements of HTR in the lesson, in fact, so thoroughly that the observer marked 3 or 4 (out of 4) points for six of the seven categories of the Teach-HTR instrument. The whole-class discussion scored 2 points. The observation of Jan's lesson produced similar results, although he mainly demonstrated HTR and engaged his students in an assignment and whole-class discussion that asked for HTR. For example, Jan asked his students to assess the trustworthiness and representativeness of sources about enlightened absolutism.

Change in the external domain, relevant sources of growth

We were particularly interested in observing how the Teach-HTR instrument could lead to changes in the external domain, i.e., as a source of information, stimulus or support, and if it was a source of growth. The teacher educator, who already had experience using other observation instruments, confirmed that Teach-HTR was useful and could easily be integrated in teacher education. For the teacher educator, it was important to know which challenges students faced when teaching HTR, and the instrument was found helpful in this respect: 'I saw students reflect more on historical thinking after we had discussed their own classroom observations … They thought it was very helpful and useful.' The students appreciated the instrument's concrete description of teacher behaviour, how it provided insight into HTR skills and could be used as a checklist when designing lessons. In the learner reports, the students elaborated on what they had learned from the instrument, and student 6 stated: 'From the instrument Teach-HTR I learned how different aspects of HTR can be observed and what concrete behaviour to look for when trying to observe or indeed teach HTR,'. Student 5 added: 'With these behavioural descriptions, you can take a more specific look at what you want to achieve in class and how to evoke this student behaviour.' All students saw the instrument as a source of growth according to the learner reports. Three students said they had learned most from observing another student's lesson using the instrument. Other sources of growth mentioned were the group sessions with their teacher and the reading materials.

Joke learned from the instrument how to consider other ways of including HTR in the lessons and how to use such an instrument when preparing a lesson. She felt she had learned the most from observing another student-teacher and the discussions with her peers and the course teacher. In his learner report Jan stated: 'From the instrument Teach-HTR, I learned to include

explicit instruction in my teaching of HTR. First, I just presented the pupils with questions concerning the different types of reasoning. Now, I've learned to explicitly instruct pupils on how to think and reason historically.' He learned the most from reading about HTR and comparing it with the requirements of the national curriculum. Other students described their basic learning as 'how to incorporate HTR even more into your lessons' or 'how you as a teacher can demonstrate HTR' and said that the observation instrument provided overview and support.

Possible hindrances to growth

In the group discussion about Teach-HTR, the students mentioned that the instrument focused too much on teacher behaviour, rather than to what extent the pupils engaged in HTR. Its basic structure, i.e., being teacher centred, was perceived as a drawback by some. Despite the instrument being considered very concrete when it came to teacher behaviour and the students said they learned much from observations using it, some found it somewhat abstract and asked for more examples. However, the main challenges the students faced did not have to do with the instrument but rather with the complexity of teaching HTR. This was corroborated by the reflections of their teacher. Both Joke and Jan said that their main challenge was including several items of HTR in the same lesson. Joke seemed almost apologetic that one category of the instrument was not observed in her lesson, and her peer consoled her in her notes ('This is okay. You simply cannot cover source analysis every lesson.') Other students added that various sides of each HTR component could easily be overlooked in the hustle and bustle of classroom teaching.

Conclusion and discussion

Teaching historical thinking and reasoning is a complicated task that needs careful attention in teacher education programs. Here, we investigated whether and how the observation instrument Teach-HTR could be of use in this context. We used the Interconnected Model of Professional Growth to describe and explain how professional growth occurred. It turned out that the instrument added to the students' professional growth when used in conjunction with peer observation and discussion. Learner reports and questionnaires were mainly used for the purpose of research to better understand the professional growth but also worked as instruments of reflection for the students. The teacher educator confirmed the usefulness of Teach-HTR and the role it played in supporting their students' teaching of HTR. In general, the students already valued teaching HTR and were positively disposed towards learning how to teach it. The instrument added to their knowledge of actual teaching behaviour related to HTR (personal domain), although some students would have liked more concrete examples related to the categories of the instrument. The interaction between the personal domain and the domain of practice is visible. The instrument's influences on the latter manifested itself in HTR centred assignments and teacher talk including many elements of demonstrating HTR. It stimulated experimentation and initiated change. Before the program, the students could address several different types of teacher behaviour associated with teaching HTR (usually 3-4), but fewer actual elements of HTR (0-4). The observations of their lessons show that they demonstrated much of the teacher behaviour that we refer to in the instrument as teaching HTR. Six of the students managed to prepare an assignment that asked for HTR, in addition to demonstrating it themselves (all but one). Joke taught HTR to a considerable extent in her lesson, according to the observation and analysis by her peer, and earned her growing confidence, although she demonstrated a slight decrease in confidence regarding some categories of teaching HTR. Jan also emphasized HTR to a considerable extent in his lesson. He presents an interesting exception in that his confidence diminished during the program. In the prequestionnaire, his marks were the highest of all the students and he had quite clear ideas of the teaching of HTR. Since the domain of consequences (salient outcomes) partly lies beyond the scope of this study, it is only guesswork that he may have undergone some type of a reality check when he designed and taught a lesson devoted to HTR and

realized how challenging it is to teach HTR. We must be careful when interpreting changes in scores on the self-efficacy questionnaire. At the post measurement, participants probably did not always remember exactly what they had entered in the pre-measurement, and the score on the postquestionnaire is strongly influenced by how certain parts, such as conducting a whole-class discussion that requires HTR, went. Nevertheless, the instrument contributed to this domain regarding the design of assignments. The student teachers found it helpful that it provided concrete examples of teacher behaviour related to the teaching of HTR. Several of them were positive about observing another student's lesson using the instrument. They were not extensively trained in how to use the instrument. Such a training might add to the quality of the peer discussions.

The instrument was used to promote professional growth without prescribing any particular approach because the aim was to see how a teacher educator could integrate the use of the instrument in their regular practice. The students received coaching and strived to incorporate several items of HTR in their lessons. We do not know what the results would have been if the student teachers had simply focused on one category of choice in their lesson. The instrument does not only provide means and tools for teaching HTR but supports the student teachers' beliefs in the value of teaching HTR, which is of crucial importance (McCrum, 2013; Pajares, 1992). The complex interaction between beliefs and enactment is reciprocal in the sense that it is hardly beneficial to teach without realizing what lies beneath. Aided by some of the literature that the instrument is based on and peer reflections, it provided a solid footing for teaching HTR. However, as some of the student teachers needed more concrete examples, it would be advisable to pay more attention to discussing the categories, the underlying literature and concrete examples to develop a rich understanding. Furthermore, peer observation and therewith post-observation discussion need to be carefully prepared, e.g. by training, if they are to provide reliable information.

The limitations of the current study must be acknowledged. When analysing the student teachers' data, many questions arose, and although we already combined different types of data to ensure triangulation, it would have been better to include an opportunity for the researchers to interview the student teachers to be able to probe deeper and gain a better understanding of their motives and actions. Case studies are particularly suitable for answering how and why questions. We aimed at describing student teachers' professional growth in teaching HTR and how the observation instrumented functioned as a source of growth. Interviews might have provided more insight in why the students learned using the instrument.

It can be concluded that an observation instrument such as Teach-HTR can easily be integrated in teacher training. Thus, it can support those who are taking their first steps in history teaching. It would be interesting to use the instrument with a larger group of student teachers over a prolonged period of time to gain more knowledge of how professional change occurs when teachers wish to emphasize the teaching of historical thinking and reasoning. It can also be used by experienced teachers who wish to investigate or modify their practices when teaching HTR, as a self-report or to analyse video recordings of their lessons. The instrument can serve as a framework for reflection, e.g. a mutual one where peers discuss their teaching in a learning community. In this way, it can support the professional growth of both experienced teachers and student teachers.

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Appendix 1

Categories and items of the Teach-HTR instrument

A: Teacher's instruction of historical thinking and reasoning				
1. The teacher *communicates learning objectives* related to the development of students' historical thinking and reasoning ability	1	2	3	4
☐1. Communicates objectives that focus on strategic knowledge (how to do things in history, e.g. investigating sources), second-order concepts (e.g. cause, change, evidence) or the nature of historical knowledge (in history knowledge is constructed, it is often insecure and not fixed) ☐ 2. Communicates objectives that focus on deeper understanding of some historical phenomena (e.g. causes and consequences, changes, significance) ☐ Communicates goals, but not focused on historical thinking or reasoning ☐ Does not communicate any goals at all				
2. The teacher herself/himself *demonstrates historical thinking or reasoning* without explaining explicitly what he is doing or giving instructions on how to do it	1	2	3	4
☐ 3. Asks historical questions, problematizes ☐ 4. Provides historical context (e.g. time, place, developments)/contextualizes events or actions of people in the past ☐ 5. Makes clear that contemporary standards should be avoided when looking at the actions of people in the past ☐ 6. Explains historical phenomena, causes and consequences ☐ 7. Discerns aspects of change and continuity ☐ 8. Compares historical phenomena and/or periods (e.g. a comparison with the present) ☐ 9. Assigns historical significance to persons, events or developments ☐ Does not do any of this				
3. The teacher uses historical sources to support historical thinking and reasoning	1	2	3	4
☐ 10. Sources ☐ 11. Contextualizes ☐ 12. Investigating/close reading of sources ☐ 13. Compares information from different sources ☐ 14. Evaluates the usefulness/reliability of sources in relation to a specific question ☐ 15. Uses information from sources as evidence in an interpretation / to support a claim ☐ Uses historical documents, pictures and/or objects merely to illustrate the content ☐ Makes no use of historical documents, pictures and/or objects				
4. The teacher makes clear that there are multiple perspectives and interpretations	1	2	3	4
☐ 16. Presents different historical interpretations such as explanations, interpretations of change and historical significance, sometimes through time ☐ 17. Presents and explores perspectives of different historical actors on the same event/in the same period ☐ 18. Presents two or more perspectives: local/regional/national/global ☐ 19. Presents two or more perspectives: economic/political/sociocultural ☐ 20. Makes clear that the perspective presented is only one of many or changes through time ☐ Does not present multiple perspectives or interpretations				

5. The teacher provides *explicit instructions* on historical thinking and reasoning strategies / the nature of historical knowledge	**1 2 3 4**

☐ 21. That it is important to contextualize events or actions of people in the past/take a historical perspective / how to contextualize

☐ 22. How to explain historical phenomena, types of causes and consequences

☐ 23. How to identify/describe processes of change and continuity

☐ 24. How to compare historical phenomena and/or periods

☐ 25. How to evaluate and use historical sources as evidence

☐ 26. How to assign historical significance to a person, event or development

☐ 27. That there are multiple perspectives and interpretations

☐ 28. How to formulate arguments (pro and contra) and/or use evidence to support viewpoints

☐ The teacher does not do any of this

B: Actively engaging students in historical thinking and reasoning

6. The teacher engages students in individual or group assignments that ask for historical thinking and reasoning	**1 2 3 4**

☐ 29. Assignments that ask for historical thinking and reasoning activities: asking historical questions, constructing a historical context, explain, compare or connect historical phenomena or concepts, discern aspects of change and continuity, assign historical significance, identify/compare perspectives and interpretations

☐ 30. Assignments that ask for the evaluation or analysis of historical sources

☐ 31. Assignments that ask for argumentation: supporting claims about the past or sources with arguments

☐ Assignment(s) do not ask for any of the above

☐ Students do not engage in assignments

7. The teacher engages students in a whole class discussion (that is conversation between students and teachers with the participation of more than one student) that requires historical thinking and reasoning (not simply asking for factual information).	**1 2 3 4**

☐ 32. In which they are provoked to think/reason historically in order to activate prior knowledge or to deepen a particular topic

☐ 33. In which the teacher debriefs assignments and requires students to verbalize (and compare or evaluate) their historical thinking and reasoning

☐ The whole class discussion does not ask for any of the above

☐ Students do not engage in a whole class discussion

Overall impression of the lesson:

Did the students work individually or in groups?

Other remarks (for example how much time was spent on the indicators above):

Investigating adolescents' historical reasoning skills when analyzing and interpreting an image

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ABSTRACT

This study investigated adolescents' (secondary school students, N = 145, M age 13.9 years) historical reasoning skills when analyzing and interpreting an image. Presumably, historical reasoning can be fostered when engaging in inquiry-based writing. However, in past research using inquiry-based writing tasks, textual sources rather than images prevailed. The present research investigated students' writing skills when interpreting a historical image. Participants were presented with a historical photograph and were asked to write a structured text about their analysis and interpretation of this image. A scoring rubric was developed to assess the quality of students' historical reasoning skills, specifically: (1) asking and answering historical questions, (2) reasoning about images, and (3) reasoning with images. Findings show that the factor structure of the scoring rubric largely overlaps with theoretically distinguished components of historical reasoning. Students were able to ask historical questions and write a well-structured text. However, most students did not describe and analyze the source of the image and did not refer to the main message of the image. Further, many students could not identify the image's relevance for the present. Importantly, the findings imply that students' methodological competencies to critically analyze and interpret the used image were not elaborated. Possibly, they do not receive sufficient training addressing these skills. This seems problematic, not only in history education but also when deriving meaning from images in everyday life.

KEYWORDS

Historical reasoning, Image analysis and interpretation, Historical writing

Introduction

Adolescents are increasingly confronted with historical content, for instance, through images and films on the internet (McGrew et al., 2018; Paxton & Marcus, 2018). Further, they increasingly produce digitally edited images and communicate through these (Külling et al., 2022). Images, especially photographs, are often presented uncontextualized and might mistakenly be considered accurate reflections of reality (Burke, 2008). Thus, adolescents need to develop competencies to analyze and interpret images from the past and present in a reflective and critical way.

Image interpretation skills are particularly crucial in history education, as images can reveal information that written sources possibly cannot. Historical images can give an eye-witness perception and provide insights into mentalities and cultural aspects of the society, particularly for periods when the skills to write about living conditions were limited in the population (Burke, 2008). Furthermore, to understand textual sources, different language levels might hinder accessing and interpreting these, e.g., the level of the source as a representation of past language acts (Handro, 2013). Images, due to their visual representation seem easier accessible.

In history lessons, the importance of images is recognized, and historical images are used extensively (Bernhard, 2017; Van Nieuwenhuyse et al., 2017). However, history textbooks and teachers seldomly create assignments asking for a thorough examination of images (Bernhard, 2017). Instead, images are mainly used for illustrative purposes rather than for discussion and contextualization, and students seem to inspect, analyze, and interpret images superficially (Bernhardt, 2007; Wolfrum & Sauer, 2007). Students rarely engage in writing tasks when learning with images, and a prolonged and elaborated examination of images in history lessons seems to fall short (Bernhard, 2017).

Considering the importance of images as historical sources, it seems important to investigate to what extent students are able to apply historical reasoning skills when working with images. Although there are indications that analytical skills are lacking, it is unclear to what extent students show historical reasoning competencies when learning with images. The present research aims to obtain insights into this, by analyzing to what extent aspects of historical reasoning are shown in students' written image interpretation.

Aspects of historical reasoning

A significant aim of history education is to teach students to reason historically. That means developing competencies to connect the past to the present and future by asking questions and analyzing and interpreting sources (Schreiber et al., 2006; Van Drie & Van Boxtel, 2008). The ability to develop historical questions has been described as a prerequisite for analyzing and interpreting historical sources (Van Boxtel et al., 2021).

However, very little empirical research addresses how students ask historical questions and connect historical significance with the relevance of the image for the present (Lévesque, 2005; Logtenberg, 2012, Phillips, 2002; Sebening, 2021). Logtenberg (2012) found that students can

formulate historical questions by themselves, although their questions are often descriptive (what/when/how questions). Sebening (2021) showed that students can express comparisons and analogies between the past and the present, but that these remain shallow, i.e., unreflective and contextless.

Importantly, when applying historical reasoning skills, students have to show that they are able to reason *about* as well as *with* the sources (Rouet et al., 1996). Reasoning about sources refers to students' skills to critically analyze the source and assess the value and the limits of information, including recognition of the author's perspective and aims and the context in which the source was produced. Wineburg (1991) identified three heuristics that historians apply while reading historical texts, i.e., sourcing, contextualization, and corroboration, which can be subsumed to reasoning about sources. Reasoning with sources refers to the skills involved in selecting information from sources and using this information to construct explanations about how the past is connected to the present (Lévesque, 2005; Phillips, 2002).

Although some adolescents as young as in eight grade are able to apply historical reasoning skills (De La Paz et al., 2014), it appears challenging for students to learn to reason about historical sources (De La Paz et al., 2012; Sendur et al., 2021). Students do not spontaneously apply strategies when reasoning *about* sources, such as sourcing, contextualization, and corroboration (Britt & Aglinskas, 2002; Nokes, 2017). Reasoning *with* sources is equally challenging for students because producing evidence-based interpretations using arguments is not commonplace at school (Britt & Aglinskas, 2002; De La Paz et al., 2017; Nokes & De la Paz, 2018; Waldis et al., 2020).

Historical reasoning about and with images

Learning with images is considered different from learning from texts, particularly when it comes to perception, analysis, and interpretation (Krammer, 2006; Lieber, 2013). Images are typically perceived for a shorter duration and given less attention than texts, even when these bring information that cannot be found in the text (Oestermeier & Eitel, 2014). Texts are typically processed in a fixed order, due to the linear structure, whereas an image leaves more room for dynamic processing (Oestermeier & Eitel, 2014). Possibly, learners presume that images are easier to understand than texts because images and their content can be captured quickly (Weidenmann, 1991). Because of this quick processing, an uncritical viewer may easily be deceived, e.g., by propaganda, and perceptions can be biased due to prior knowledge, experiences, and beliefs (Wolfrum & Sauer, 2007). Therefore, relevant information from the image might be unrecognized or ignored and this may lead to incomplete or false conclusions. Furthermore, Wolfrum & Sauer (2007) found that secondary school students rated information content higher in texts than images, whereas they judged meaning-making with images easier than with texts. It appears that, when analyzing and interpreting images, extra support is needed, because "no image explains itself", according to Gombrich (1984, p. 142). Generally, such support is given in textual information. Therefore, learners do not only need specific image interpretation competencies, but also text comprehension skills.

Students' historical reasoning competencies can be assessed by investigating the quality of their writing (Nokes & De la Paz, 2018). Commonly, inquiry-based writing tasks are used, which involve asking questions, searching and analyzing multiple sources as historical evidence, and interpreting these with arguments (Monte-Sano & De La Paz, 2012; Van Boxtel et al., 2021). In the present research, a historical writing task, i.e., writing an argumentative essay, is used to obtain insight into students' historical reasoning when learning with images. Besides being used for research purposes, inquiry-based writing tasks including argumentation can be beneficial for students in actual education, because they actively form their own conclusions instead of trying to understand a ready-made historical narrative (Van Boxtel et al., 2021). These tasks seem to have positive effects on starting historical reasoning processes and can foster students' analysis and interpretation of images by supporting them to examine information in-depth, and structure their thinking (Britt & Aglinskas, 2002; Rouet et al.,1996; Wiley & Voss, 1999).

Until present, students' competencies to interpret historical sources have mainly been investigated with the use of textual sources (Monte-Sano & De la Paz, 2012). To our knowledge, no studies assessed students' historical reasoning competencies when writing about their interpretation of images. When images are included in document sets, they mainly illustrate the content of predominant text sources, rather than serving as an independent source (Waldis et al., 2015).

Several models have been developed to score students historical reasoning. However, these tend to describe historical reasoning rather generally, and do not specifically assess students' historical reasoning when working with images as primary sources. For this study, assessing historical reasoning with images, components of the historical reasoning model by Schreiber et al. (2006) and components of image interpretation research by Bätschmann (2009) were used in conjunction to assess historical reasoning with images.

The present research investigates adolescent students' image interpretation, by assessing the quality of their essays. We investigated to what extent the scoring rubric distinguishes between components of historical reasoning. Even though inquiry-based writing tasks have mainly been used to assess historical reasoning with text sources, we expected that we would see similar historical reasoning processes when writing essays about images. According to our hypotheses, we addressed the following research questions:

RQ1: Can the developed scoring rubric be validated according to components of historical reasoning: (a) asking and answering historical questions; (b) reasoning about images (i.e., analyzing the image); and (c) reasoning with images (i.e., selecting and using information from prior analysis to explain the relevance of the image)?

RQ2: To what extent do students show competencies of historical reasoning in their essays about image interpretation?

Methods

Participants and design

Participants were 145 secondary school students (*M* age = 13.92, *SD* = .65; 50.3 % girls), who were either in the 8th grade at the end of the school year or the 9th graders at the beginning of the school year. Students were from the German-speaking part of Switzerland, and part of nine different school classes from four schools. All students had sufficient German skills to follow instruction in the German language. They were enrolled in lower secondary school, a three-to-four-year secondary school track (ranging from grade seven to nine, and a voluntary 10th grade). School tracks prepare students for a further education track, most often vocational education, but also a continuation to a gymnasium. On average, students obtained one to two hours of history education per week. Informed consent was given by their caretakers, and at the start, participants were told that they could drop out without any consequences. This study was part of a larger short-term longitudinal study with three measurement points, aiming to investigate potential changes in historical reasoning with images. The data for the present study was collected at the first measurement point.

Materials and procedure

The image was a black and white photo by an unknown author from 1947. It showed two mid-aged women laughing about a voting poster in the background, at the time of the cantonal vote on women's suffrage in Zurich (Switzerland). The image was checked for its suitability and difficulty for the intended school level by teachers, art historians, and history educators. The image is owned by, and retrievable from Keystone-SDA (https://tinyurl.com/39eh6n49) or from a history textbook commonly used in Swiss schools (Fuchs et al., 2018, p. 78). To ensure that prior knowledge would be low, teachers confirmed that this image was not used in class before.

Additional information about the image background (85 words) and the context (129 words) was presented below the image. This information was based on a history textbook text about women's suffrage (Fuchs et al., 2018). The additional information did not reveal interpretive elements of the image itself.

After welcoming the students, the aim and procedure were explained (5 min). Then, students filled out online questionnaires (15 min). Due to the scope of the present paper, these questionnaires are not discussed further. Then, students were instructed (with a PowerPoint presentation) about the purpose of image analysis and interpretation, and how they could structure an image interpretation text with an introduction, main part, and conclusion (20 min). They were presented with a scheme showing the text structure (see Appendix 1). Afterwards, a sheet with an example text (see Appendix 2) and a corresponding image from a known curriculum topic (industrialization/child labor represented in the photograph by Lewis W. Hine, *John Howell an Indianapolis newsboy*, from 1908) was distributed to students for individual study (5 min) and was then collected again. The colors in the scheme and the example texts were the same, to support comparison between the scheme and the example text. The aim of the example text was to prepare students for the upcoming image interpretation and writing task.

After this instruction phase, students analyzed and interpreted the given image individually (40 min). Participants used a computer or tablet to search the internet for information to analyze the image. They received a handout with a visualization of the text structure (introduction, main part, conclusion), the prompt, the image with title and year of origin, a detailed caption (author, title, year, technique, publication details, and publication rights), additional information about the historical background and image context, and note paper to write down their image interpretation.

The prompt was: Give this image a meaning like a historian would do by using your collected information to write a meaningful image interpretation. Write a text of at least 300 words, taking the following criteria into account:

- Formulate a relevant question about the image, referring to the history and the present

- Mention the main message of the image, and describe the image accurately

- Summarize the information you collected (internet research/materials) to analyze the image

- Write a conclusion in which you present and justify your interpretation of the image

Students sat alone or visors were put up between students. Students self-paced their internet search and writing time. The researcher informed students 20 minutes before the lesson ended about the time left and recommended them to start writing if they had not yet started with that. After writing the image interpretation, texts were collected. Students who finished early could do an extra task: Finding differences between two images.

Coding of the image analysis and interpretation

To assess historical reasoning, a scoring rubric was developed, which combines generic historical reasoning components with specific image interpretation competencies (Kuckartz, 2014). The rubric was based on previous research (as outlined below) and on experiences with coding texts from students, who participated in a prior pilot study. Student texts were coded with MAXQDA version 2022. Coding was discussed by two raters. Before starting the individual coding process, two raters double-coded 10% of the texts, interrater reliability was high (Krippendorffs' α = .86). After having coded approximately 50% the texts, the two raters double-coded 10% of the texts again, and interrater reliability was acceptable (α = .78). After both interrater reliability assessments, coding differences were discussed, and the codebook was adapted where needed. Then the two raters equally divided and rated the remaining texts.

The rubric consists of three components (asking and answering historical questions, reasoning about images, and reasoning with images), and a total of 10 categories indicating subcomponents

of these components (see Appendix 3). For each category, a participant could reach level zero (low quality) up to three (highest quality).

Component 1: Asking and answering historical questions

Theoretically, this component consists of two subcomponents: (1) *Historical questioning*, and (2) *Answering the question*. Coding rated to what extent students described "a product or a (potential) start of historical reasoning while trying to put into words a conflict or deficit in prior knowledge about historical constructs, phenomena or developments" (Logtenberg, 2012, p. 91). When answering a historical question, it was rated to what extent students did this in a plausible way and justified their answer with reasons (Logtenberg, 2012).

Component 2: Reasoning about images

For this component was scored to what extent students were able to identify and use historical information. This component was expected to consist of two subcomponents: (1) *Sourcing*, and (2) *Contextualization* (Reisman, 2012; Wineburg, 1991). For sourcing was rated to what extent information from the image caption was included in the written text, such as the name of the author, title, date, technique/type of image (genre), origin, and place of storage (Büttner, 2014). Contextualization addresses the context of the source such as information about the author, publication context, targeted audience, intention/motivation of the author making that image, and tendencies towards media critique (Britt & Aglinskas, 2002; Van Nieuwenhuyse et al., 2017).

Component 3: Reasoning with images

For this component was assessed to what extent participants used sources and their analysis to describe and explain historical events or phenomena, based on their starting question (Krammer, 2006). Theoretically, this component consists of the subcomponents (1) *Image description*; (2) *Main message of the image*; (3) *Image interpretation*; (4) *Image reference*; (5) *Relevance for the present*, and (6) *Text structure*. For the image description was rated to what extent participants described the image or pictorial details in connection to aspects of the image composition (Bernhardt, 2007; Hamann, 2012; Krammer, 2006). To rate the main message of the image, the quality of the connection between the image and the historical event, and the inherent social issues were rated (Baxandall, 1990; Bernhardt, 2007). For the image interpretation was investigated to what extent connections between the image elements, the historical event, and social issues were explained and justified. To rate the image reference, the embedding of the image in the written product was investigated. When rating the component relevance for the present, it was assessed to what extent participants connected the past to the present, by explaining why historical events or social issues might be of today's importance (Lévesque, 2005; Phillips, 2002). With the rating of the text structure was assessed to what extent students could formally structure their texts with an introduction, a main part, and a conclusion.

Statistical analyses

For each of the subcomponents, students received a score from zero to three. To investigate whether theoretical components of historical reasoning were shown in the scoring, an explorative factor analysis (using principal axis factoring) was conducted on the 10 subcomponents of the scoring with oblique rotation (direct oblimin). Based on the Kaisers criterium, only factors with eigenvalues greater than 1 were retained. Although EFAs based on polychoric matrices have been suggested for ordinal data, at least 300 observations per item are recommended to use this approach (Lloret et al., 2014). Our sample size ($N = 145$) would be insufficient to use this approach. According to Robitzsch (2020), ordinal variables can be treated as continuous variables for EFA analyses, when items have three or more categories. As we had four categories per item, we decided to report our EFA based on the principal axis factoring approach with use of Pearson's correlation matrices. However, we also explored if factor loadings would be the same using the polychoric matrices approach, and no differences in the factor structure appeared.

Further, historical reasoning skills were investigated per subcomponent, and further, to investigate overall quality of historical reasoning, an overall score was calculated per student by adding up the ratings for the ten subcomponents. All analyses were conducted with SPSS version 27 and R, packages lavaan (Rosseel, 2012) and psych (vo.2.3.3; Revelle, 2023).

Results

Validating the scoring rubric

Internal consistency was acceptable, Cronbach's Alpha = .73, which implies that the scoring rubric had acceptable reliability. The scoring for the 10 subcomponents were added to conduct an exploratory factor analysis, the Kaiser-Meyer-Olkin measure verified the sampling adequacy, KMO = .62 (Kaiser & Rice, 1974). All KMO values for individual items, except for the subcomponent main message of the image with .41, were above the acceptable limit of .5 (Kaiser & Rice, 1974). We kept this item for theoretical reasons (as main message of the image is considered an aspect of image interpretation in previous work) but also because Cronbach's Alpha indicated good internal consistency when including all 10 coding categories. Four factors had Eigenvalues greater than 1, and these factors explained 69.38% of the variance. The factor loadings of the subcomponents are presented in Table 1.

Table 1

Summary of exploratory factor analysis results for the SPSS Historical Reasoning Categories (N=145)

	Rotated Factor Loadings			
Subcomponent	Factor 1	Factor 2	Factor 3	Factor 4
Historical Questioning	**.65**	-.05	-.00	-.08
Answering the Question	**.71**	.04	.03	-.08
Text Structure	**.72**	-.03	.19	.18
Relevance for the Present	**.41**	.10	-.09	.11
Sourcing	.02	**.67**	.05	-.04
Contextualization	.01	**.72**	-.02	-.02
Image Description	-.05	-.00	**.92**	-.17
Image Reference	-.10	.26	**.59**	.22
Image Interpretation	.15	-.02	**.47**	.08
Main Message of the Image	.01	-.04	-.00	**.94**

Note: Factor loadings over 0.40 appear in bold.

As expected, historical questioning and answering the question loaded on the same factor (Factor 1), which likely indicates the theoretical component *asking and answering historical questions*. The subcomponents sourcing and contextualization loaded on Factor 2, which can be allocated to the historical reasoning component *reasoning about images*. The subcomponents image description, image reference, and image interpretation loaded on Factor 3, which matches the theoretical component *reasoning with images*. However, three more components that were expected to also load on this factor, relevance for the present, text structure, and main message of the image did not load on Factor 3. Instead, text structure and relevance for the present loaded on Factor 1, and the subcomponent main message of the image loaded on a separate factor (Factor 4). In sum, the

scoring rubric had acceptable internal consistency, and the EFA showed that historical reasoning consists of different components. There did not seem to be a full match with our expectations regarding the assignment of subcomponents to overarching components (based on theoretical ideas). However, the extracted factors largely overlap with the theoretically distinguished historical reasoning competencies, particularly *asking and answering historical questions*, *reasoning about sources*, and *reasoning with sources*.

Students' historical reasoning competencies

Overall, students could obtain a maximum of 30 points for their texts. The mean score was 10.63 points, *SD* = 4.91. The Shapiro-Wilk-Test indicated a normal distribution of the sum score, *p* > .05.

Further, we investigated to what extent students are able to apply historical reasoning competencies. Scores for the subcomponents are shown in Table 2. Overall, students were able to ask historical questions and to write a well-structured text. However, students' *reasoning about images* was poor; most students did not describe and analyze the source of the image. Furthermore, most students did not make any reference to the main message of the image, and almost half of the students were not able to identify the relevance of the image for the present.

Table 2

Summary of frequencies in percentage for the SPSS (Sub)components of Historical Reasoning Categories (N=145)

(Sub)component	Level 0	Level 1	Level 2	Level 3	Median
Factor 1: Asking and Answering Historical Questions					
Historical Questioning	14.5%	15.2%	55.2%	15.2%	Level 2
Answering the Question	33.1%	31.7%	26.9%	8.3%	Level 1
Text Structure	20%	26.2%	36.6%	17.2%	Level 2
Relevance for the Present	49%	26.9%	13.8%	10.3%	Level 1
Factor 2: Reasoning about Images					
Sourcing	59.3%	17.2%	13.1%	10.3%	Level 0
Contextualization	76.6%	15.2%	6.9%	1.4%	Level 0
Factor 3: Reasoning with Images					
Image Description	20%	44.8%	22.1%	13.1%	Level 1
Image Reference	9%	45.5%	31.7%	13.8%	Level 1
Image Interpretation	42.1%	42.1%	14.5%	1.4%	Level 1
Factor 4: Describing the Main Message					
Main Message of the Image	51.7%	15.9%	29.7%	2.8%	Level 0

Discussion

Images are commonly used in history education with the aim to engage students' historical reasoning processes. The present study investigated adolescents' historical reasoning about and with an image using an inquiry-based writing task.

Our first aim was to investigate to what extent the scoring of students' essays showed similar components of historical reasoning as previous research using text sources, rather than images (RQ1). In line with our expectations, the developed scoring rubric differentiated between students' skills related to *asking and answering historical questions*; *reasoning about images*; and *reasoning with images*. This indicates that, as previously found with text sources (e.g., Rouet et al., 1996; Waldis et al., 2020), also image interpretation can be considered a multidimensional historical reasoning process.

However, the loading of specific subcomponents on overarching components did not entirely confirm our expectations. Particularly, we assumed that the subcomponents relevance for the present and text structure would belong to the component *reasoning with images.* Instead, these subcomponents were more closely related to the component *asking and answering historical questions*. These findings may not be surprising in the present context. In the writing prompt, students were instructed to try to connect their question to the present. The factor loadings indicate that answering the question and indicating the relevance for the present belong together. Moreover, text structure also loaded on this component. This would seem logical in this context: by asking a question and answering a question a text gets structured and framed.

Further, the subcomponent main message of the image was expected to belong to the component *reasoning with images.* Instead, this subcomponent came out as an independent factor. As further discussed below, formulating a main message appeared challenging for students. A preliminary image analysis is necessary to subsequently connect the image to history. However, image analysis skills appeared to be deficient. This may have influenced the findings about the categorization of this subcomponent. Future research could further address whether this subcomponent loads as an independent factor or should be subsumed to components of historical reasoning.

Our second research aim was to investigate to what extent students show historical reasoning competencies, i.e., *asking and answering historical questions*, *reasoning about, and reasoning with sources*, when interpreting a historical image (RQ2). Students were well able to formulate a historical question, which seems in line with findings on formulating historical questions about text sources by Logtenberg (2012). It has to be noted though that our findings show that most students asked descriptive questions, e.g., questions aiming at image comprehension. Such lower-order questions may not directly stimulate inquiry (Logtenberg, 2012). Thünemann (2009) suggests that students lack skills to formulate elaborated historical questions because they are typically not trained to do so in history education. Further, students were relatively well able to structure their text. Before starting the writing task, students were presented with an example text, which probably had positive effects.

Although students were able to ask (mainly descriptive) historical questions, answering these seemed challenging. Apparently, as also suggested by Logtenberg (2012), the quality of questions does not necessarily relate to the quality of historical reasoning processes when answering these. That is, elaborated questions do not automatically lead to elaborated answers. The scoring of the component *reasoning about images* brings insight into students' image analysis skills. Sourcing and contextualization were hardly visible in students' essays. Previous studies showed similar issues with students' image analysis (Bernhardt, 2007; Labischová, 2018; Lange, 2011; Wolfrum & Sauer, 2007). Although students were explicitly informed about the source (in the caption and the context description), most students ignored this information. This seems to indicate that students did not deal with the image as historical source.

To thoroughly interpret an image, an image description and an image analysis would seem important, as coded with *reasoning with images*. When describing an image, most students only

described a few pictorial details related to image composition. Often, the image description was fragmented, rather than being focused, and almost one-fourth of the students did not describe the image at all. This confirms findings by Labischová (2018) that students ignore pictorial details when interpreting a historical cartoon. Image details are often used to illustrate and emphasize its main message (Baxandall, 1990). However, results for the scoring of main message of the image shows that most students were not able to formulate this. When students described main messages, these were seldomly justified by relevant pictorial details. Instead, image descriptions often included irrelevant details. For the subcomponent image reference, most students received a low score. They did not put the image at the core of their interpretation and tended to focus more generally on the historical event without connecting it to the image. This may be a reason why many students cannot connect the image with a historical event/phenomenon and are unable to formulate a main message. When not connecting an image to the past, it would seem impossible to connect the image to the present. Indeed, our findings indicate that almost half of the students omitted the relevance for the present. When the description and the analysis of the image are incomplete or superficial, the interpretation most likely consists of false conclusions or overinterpretation. Findings that most students received low scores for image interpretation seem to confirm the importance of a thorough prior analysis.

The present research is the first to extend the findings previously found with text interpretation tasks to an image interpretation task. As for texts, also when using an image as historical source, it seems particularly challenging to reason about and reason with sources (Britt & Aglinskas, 2002; Nokes & De la Paz, 2018). Although, findings seem comparable to reasoning with textual sources, learning with images demands other skills to critically evaluate visual information. Research in history education about images does not reflect the prominent status of images in education and society. Our study is just one of a few which addresses that. In this study, one image, a photograph from 1947, was used for the image interpretation task. Future research should replicate the findings with different types of images. Further, although the findings of our study bring insights into strengths and weaknesses in adolescents' historical reasoning skills, participants were recruited from secondary schools in German-speaking areas in Switzerland. Future research should investigate generalizability of these findings and address if these can be replicated with different samples varying in e.g., language, different historical and cultural contexts, age level, and educational level.

This study is also one of the few which estimated construct validity of text ratings. This allows insights into the multidimensional construct of historical reasoning and the competencies which students should achieve when learning with images. In addition, our rubric might give orientation for practitioners and researchers when developing learning tasks or assessments. Importantly, the findings from the present study imply that students' methodological competencies to critically analyze and interpret the used image were not elaborated. This would seem problematic, not only in history education, but also in everyday life. In the last decades, images have become more accessible than ever before to adolescents (particularly due to the rise of social media), and often, images are manipulated and presented uncontextualized. Our results show where specifics skills may be lacking when dealing with images and indicate that only providing context information with an image may not be enough to support critical reasoning. Apparently, students need more support and training to learn how to analyze and interpret image sources. Future research should investigate how students can be supported with this process.

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Appendix 1

Scheme of a Text Structure when Interpreting an Image

Question as title
Question related to the image, the historical event and the present day • What kind of question do I put in the center for my image interpretation that connects the image, the historical event and the present?
Introduction
Entry into the topic • How do I give the reader a brief overview of the topic? What is it about? • What is the goal of my image interpretation and how did I arrive at my question?
Main part
The main message of the image and appropriate image description • What is the main message of the image? • Image description: Which image details support my main message?
Summarizing the collected information in a meaningful way • Which of the information collected (research/materials) is relevant to understand and explain the image?
Conclusion
Answer to my question • What conclusion do I come to, and can I also justify this with the help of the information collected (research/materials)?

Appendix 2

Example text of an image interpretation

Has the child labor shown in the photograph by Lewis W. Hine changed today?

In the time of industrialization, workers often earned too little money to be able to feed their families. For this reason, children also had to work hard. Employers took advantage of the children: Long hours, physically demanding jobs, and almost no pay. In addition, the work prevented them from going to school, which worsened their future prospects. With my image interpretation, I want to pursue the question of the extent to which the photographer was successful with his photos against child labor and whether the children are better off today than they were then.

The yellowish-brownish photo by Lewis W. Hine "John Howell, an Indianapolis newsboy" from 1908 documents the dark side of industrialization, child labor in the USA. In the foreground you can see the elongated shadow of the photographer and his camera, which is on a tripod. In the middle, the newspaper boy John Howell can be seen, holding the newspapers he wants to sell under his right arm. These appear huge in comparison to the boy. The newspaper boy looks small, helpless, and lost with his eyes downcast, even though he is in the center of the picture. This impression is reinforced by the photographer's long shadow and the tall streetlamp to his left. In addition, there are no people around him, which makes him even more lonely. In the background, there is a street corner with people walking.

Hine, a photographer, and teacher was working for the National Child Labor Committee at the time, so the welfare of children was important to him. This organization campaigned against child labor and wanted to make the public aware of the poor working conditions. Through Hine's photos, a larger audience could be made aware of the problem, as these were published by the NCLC in newspapers or their own publications.

The photographer advocated for the children by taking many photos that showed their poor working conditions. Hine and the NCLC hoped that by publishing the photos, child labor could be combated. Unfortunately, however, child labor was not banned in the U.S. until 30 years later, in 1938. Child labor was not only a problem then, but it still is today. In various countries around the world, children continue to be exploited in factories, in mining, or in tourism.

Appendix 3

Scoring rubric to assess historical reasoning components

	Level 0	Level 1	Level 2	Level 3
Asking Historical Questions A historical question relates to the historical event/phenomenon and/or the inherent social issue present in the image	No question	No historical question **or** no historical question but with 1 time reference point	Historical question with 1 time reference point **or** no historical question but with 2 time reference points **or** question aiming at image comprehension	Historical question with 2 time reference points **or** question aiming at more complex image comprehension with 2 time reference points
Answering Historical Questions	No answer to the question **or** no question has been asked	Answer is given but not supported with an argument **or** answer is false, unlogic	Answer is given and supported with 1 argument	Answer is given and supported with more than 1 argument
Sourcing -Author/employer -Technique/type of image -Title -Date -Place of origin/location	No sourcing	Sourcing with 1 aspect of image formation	Sourcing with 2 aspects of image formation	Sourcing with more than 2 aspects of image formation
Contextualization -Knowledge about the author -Publication context -Targeted audience -Intention/motivation of author -Tendency towards media critique	No contextualization	Contextualization with 1 aspect about the context of the image	Contextualization with 2 aspects about the context of the image	Contextualization with more than 2 aspects about the context of the image
Image Description -Color -Light-shadow -Relations -Perspectives -Fore-, middle-, and background -Facial expressions, gestures	No image description	Image description with just a few image details connected to 0-1 aspect of image composition	Image description with several image details connected to 1-2 aspects of image composition	Image description with many or all image details connected with at least 3 aspects of image composition

	Level 0	Level 1	Level 2	Level 3
Main Message of the Image	No main message of the image	Implicit main message of the image considering the historical event/phenomenon or the inherent social issue **or** explicit main message of the image not considering the historical event/phenomenon or the inherent social issue **or** main message of the image is false	Explicit main message of the image considering the historical event/phenomenon **or** the inherent social issue	Explicit main message of the image considering both, the historical event/phenomenon, **and** the inherent social issue
Image Interpretation	No connections between the image and the historical event/phenomenon and the inherent social issue **or** connections are not explained/supported with arguments **or** connections are false or overinterpreted	1 connection is explained and supported with an argument	Several connections are explained and supported with arguments **or** a contrast/contradiction (image in the image) is noticed, but not explained/justified	Several connections are explained and supported with arguments **and** a contrast/contradiction (image in the image) is noticed and explained/justified
Image Reference	No image reference	Tendency towards an image reference is apparent, and refers to less than half of the text	Image reference is partly apparent, and refers to the half of the text	Image reference is totally apparent, and refers to more than the half of the text
Relevance for the Present	No relevance for the present	Tendency towards a relevance for the present is apparent, but is unclear, or without connecting it to the historical event/phenomenon or the inherent social issue	Relevance for the present is partly apparent, but without giving a recent example **or** a recent example was given, but is unclear	Relevance for the present is totally apparent and clearly explained with a recent example
Text Structure Consisting of 5 elements: -asking a question (1 element) -introduction (1 element) -main part with image description & main message (2 elements) -conclusion/answer (1 element)	Text is not structured, consisting of max. 2 elements	Tendency towards a structured text is apparent, consisting of max. 3-4 elements **or** consisting of 4 elements but text is not structured with paragraphs	Text is partly structured consisting of at least 4 elements and text is clearly structured with paragraphs **or** text is completely structured consisting of all 5 elements, but text is not always structured with paragraphs	Text is completely structured consisting of all the 5 elements **and** text is clearly structured with an introduction, main part, and a conclusion with paragraphs

Student questioning: What does questioning reveal about prior knowledge, historical reasoning and affect?

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ABSTRACT

Students ask historical questions when they are engaged in historical reasoning and trying to understand a particular historical phenomenon. Student questioning can be regarded as the engine and a destination of historical reasoning. This study is aimed at deeper insight into thinking processes underlying students' historical questions using a general model of questioning and a domain-specific model of historical reasoning. Thirty-three secondary school students were instructed to read a text and underline striking text segments. At the point of underlining, students were asked to verbalize their thoughts. In our protocol analysis we focused on the questions students spontaneously asked while verbalizing their prior knowledge, reasoning, and feelings. It appeared that in half of the 251 analyzed fragments (episodes) students verbalized an extent of historical reasoning and expressed feelings. Questions were mostly asked when students expressed a knowledge deficit, but spontaneous questions were also present in episodes with historical reasoning and episodes with affective responses. All components, activating prior knowledge, realizing a knowledge deficit, historical reasoning and experiencing affective thoughts, help students to ask their questions and help them to process the introduction into a historical topic.

KEYWORDS

History learning, Student questioning, Domain-specific thinking skills, Affect

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Introduction

Research in history learning focuses on students' thinking and reasoning about the past (e.g., VanSledright & Limón, 2006). Although several scholars consider the asking of historical questions to be an important component of historical thinking or reasoning (e.g., Schreiber et al., 2006; Van Boxtel & Van Drie, 2008), there is little explicit insight in how historical questions evolve. Voss and Wiley (2006) state in their summary of characteristics of expertise in history: "…an aspect of the historian's task that is virtually never studied (…) is the ability of the expert to be adroit in selecting and defining the issue to be studied. Problem finding is the critical first step in problem solving, and expert historians must have skill at posing interesting yet researchable questions" (p. 573). Regarding students, questioning plays an important role in studying aspects of historical reasoning such as sourcing (Britt & Aglinskas, 2002) and performing historical inquiry in the classroom. According to Rüsen (2007) the 'need for orientation' is a fundamental component of historical consciousness. Historical questions are asked when people or groups experience uncertainty, for example, by experiencing loss or disorder, or interest. People, including historians, can address these questions by re-constructing or de-constructing historical narratives, and these interpretations can be used to better understand or think about possibilities for the future (see also Seixas, 2015 and responses to his contribution; Trautwein et al., 2017). From this perspective, asking questions is related to history in life praxis and creates space for affective elements (cf. Logtenberg, Van Boxtel & Van Hout-Wolters, 2010).

Our goal of the present study is to conceptualize the skill of question asking in the domain of history, more specifically, to gain deep insight into students' questioning while reading a historical text. Carefully reading historical texts and asking questions are core activities in a history classroom. Reading in history goes further than the usual goals of explaining and comprehension of the content of text but demands disciplinary literacy and questions that evaluate the nature and content, criticize and connect past, present and future. Furthermore, we expect that readers' emotions influence the type of questions asked (Logtenberg, Van Boxtel & Van Hout-Wolters, 2011). Research already exists that deals with reading and questioning historical texts (e.g., Wineburg, 1991; Britt & Sommer, 2004; Reisman, 2012; Cameron, van Meter & Long, 2017; Nokes, 2017). However, these studies do not explicitly focus on *how* student questions develop, i.e., the underlying thinking processes. In addition to cognitive components, we are especially curious about the role historical reasoning and affective processes might play in the (potential) onset of questions in the domain of history (cf. Logtenberg, et al., 2010; Rüsen, 2007).

Theoretical framework: The onset of students' questioning

Research on student questioning mostly conceptualizes questioning in terms of a strategy that is important for (text) comprehension and deep meaningful learning (see for reviews Chin & Osborne, 2008; Janssen, 2002; Rosenshine, Meister, & Chapman, 1996). Graesser and Lehman (2011) state that 'Questions are at the heart of virtually any complex task that an adult performs (p. 54.)'. Questioning supports students in articulating their interest and activating prior knowledge. Questions are asked when students experience a knowledge deficit or conflict

(Graesser & Olde, 2003). The model of questioning developed by Dillon (1990) and further elaborated on by Van der Meij (1994) describes the state of puzzlement, surprise or confusion that occurs before formulating a question with the 'perplexity' construct. In line with this research, we depart from the idea that questions arise from a state of perplexity triggered by a cognitive disequilibrium (Graesser & Olde, 2003). However, working within the domain of history, we not only focus on the role of prior knowledge, but also aim at clarifying the affective and historical reasoning processes that may underlie questions.

First, we describe general models of questioning describing perplexity with a strong focus on the role of prior knowledge from a general perspective. Second, we discuss questioning from the perspective of learning history that deals with the potential role of historical reasoning and affective processes, resulting in our research question.

General models of questioning: the onset and formulating of questions

Research on student questioning (Rosenshine et al., 1996) has mainly focused on domain-exceeding skills, which has resulted in general models of questioning. Two general models support the description of the underlying processes of questioning: the model of Dillon (1990) and the model of Graesser and McMahen (1993).

Van der Meij (1994) presents a componential analysis of questioning, based on Dillon's theory of the mechanism of questioning. Three stages characterize the process of questioning: (1) the onset of questioning (perplexity), (2) the development of a question (asking) and (3) the search for and processing of an answer (answering). Van der Meij also emphasizes individual and personal factors of questioning, but still little is known about how students' questioning skills originate. In the first stage the onset of questioning is characterized by perplexity that can be triggered internally or externally. Internal cues cause uncertainty related to one's prior knowledge, while external cues trigger curiosity by surprising events or facts.

Graesser and McMahen (1993) propose a general model of questioning including three components: anomaly detection, question articulation and social editing. Their focus is mainly on the cognitive triggers of questioning, also known as the cognitive disequilibrium hypothesis. Otero and Graesser (2001) describe several 'production rules' (e.g., text characteristics) that trigger cognitive disequilibrium such as contradiction, discrepancies, salient contrasts and expectation violations.

In comparing the two models, the role of cognitive disequilibrium is prominent. The models suggest a question is triggered by a disequilibrium, but a perplexity or anomaly detection not necessarily results in the articulation of a question. When students read a history text, the experience of disequilibrium may accompany spontaneously asking questions. The characteristics of students' disequilibrium may be specified by domain-specific production rules (Otero & Graesser, 2001; Portnoy & Rabinowitz, 2014). A production rule can be used to describe the underlying process of a question, defined by disciplinary literacy in a domain. For example, a disequilibrium that students experience when reading a text about history could reflect their historical reasoning competency, their subject-specific beliefs about knowledge (Wolfe & Goldman, 2005) and could be grounded in both cognitive and affective processes. In the following sections we elaborate on the onset and formulation of questions from a domain-specific perspective. We discuss the potential role of students' prior knowledge, historical reasoning and affective processes in the onset and formulation of questions while reading a historical text.

The onset and formulation of questions while reading a historical text

Although researchers in history education state that questioning plays an important role in historical thinking and reasoning (Cameron, et al., 2017; Ciardiello & Cicchelli, 1994; Rüsen, 2007; Schreiber et al., 2006; Wineburg, 1991), empirical studies that focus on questioning processes in history are scarce. Van Drie and Van Boxtel (2008; 2018) developed a framework for studying historical reasoning. According to these authors, historical reasoning is constructing or evaluating a description of processes of change and continuity, an explanation of a historical phenomenon or

a comparison of historical phenomena or periods. Their framework consists of six components: asking historical questions, using sources, contextualization, argumentation, using substantive concepts, and using meta-concepts of history.

In this framework questioning takes a central position, as it is seen as an 'engine' of historical reasoning. Interpreting a historical phenomenon implies a search for explanations (e.g., Why did it happen?), differences and communalities (e.g., What changed?) and historical context (e.g., Was it common in that time?). From this domain-specific perspective students ask questions when they are engaged in historical reasoning in order to better understand a particular historical phenomenon. Questions are informed by students' historical interest, knowledge and beliefs about the nature and construction of historical knowledge (Van Boxtel & Van Drie, 2018). According to Seixas, historical questions 1) form a link between past, present and future, 2) are naturally occurring questions in our culture today (everybody's questions) but 3) are difficult to answer because of the complexity and uncertainty and different perspectives and the 'pastness' of the past (pp. 15-16). While asking such questions students should consider historical thinking concepts, such as historical significance, continuity and change, cause and consequence, historical evidence, historical perspectives and the ethical dimension of history (Seixas & Morton, 2012; Rüsen, 2007).

Students, however, when confronted with historical content tend to judge historical agents and situations from a present-oriented perspective or use stereotypes to describe and explain historical actions or events (De Leur et al., 2017; Hartmann & Hasselhorn, 2008). They experience difficulty in seeing persons, events and developments in the past in their own historical context (Huijgen et al., 2017; Barton & Levstik, 2004; Wineburg, 2001). Students may be perplexed when they experience disequilibrium between the information that is given about the past and what they know from their experience, the narratives they are familiar with from the communities in which they participate, and present-day standards. This experience may also be characterised by emotions, such as excitement or indignation which can trigger feelings of interest. Strong emotions may be triggered by (inter)nationally sensitive topics such as genocide, slavery or long-lasting historical conflicts within and between countries. But less strong, more general affective student reactions and imagination (interest, engagement, joy) can also play a role in learning (De Leur et al., 2017; Demetriou & Wilson, 2009; Silvia, 2006).

Indignation or astonishment about the past caused by the 'otherness' of the past can be a powerful emotion that may trigger a question that reflects this emotion or that reflects the aim to contextualise. When students experience a disequilibrium in the sense of seeing the past as 'strange' they can use different ways of reasoning in which questions can be embedded. First, students may try to empathize with past persons, actions or events, especially while reading historical narratives. Mar and colleagues (2011) describe feelings of sympathy, identification, empathy and relived and remembered emotions as playing an important role while reading narratives. Introductory texts regularly contain narrative characteristics about a historical topic. Second, questions that reflect emotion or judgment based on present-day standards may occur when students take a present-day perspective. Third, students can (or try to) contextualise past actions or events by describing or explaining in order to make sense of them. While doing this they activate prior knowledge about the historical phenomenon or period in the text. Contextualization questions reflect an attempt to deeply understand a historical event or situation (Huijgen et al., 2018).

In conclusion, students' questioning in the general questioning models is mainly regarded as a cognitive process described as a result of a knowledge deficit or a cognitive disequilibrium, whereas in history education it seems relevant to describe the underlying onset of historical reasoning and affect. In this study, we distinguish two 'appearances' in students' questioning: underlying thinking processes and spontaneously formulated questions. The thinking processes (or the onset of questioning) are characterized in terms of experiencing a lack of, or conflict with prior knowledge (as described in general models of questioning), in terms of historical reasoning, and in terms of affect (as described in history education research). In order to characterize the spontaneous questions we describe processes that co-occur and accompany question formulation.

Research Question

How can student questions be characterized by underlying processes during the onset and formulation of (spontaneous) questions?

Method

In this research, we were aiming at '*underlying*' processes of questioning, i.e., processes that remain rather covert in other studies of student questioning. For this reason a specific thinking aloud procedure was developed. This method is aimed at revealing how an introductory text triggers the first two stages of questioning, i.e., onset and formulation of questions (Van der Meij, 1994). Furthermore we were inspired by the plus-minus method that is used to evaluate reader experiences and asks readers to report their positive and negative experiences by inserting pluses and minuses in the text margin (De Jong & Rijnks, 2006, pp. 160). Thereafter, readers are asked to verbalize the reasons behind the pluses and minuses. The introductory text used in our study is mainly aimed at triggering questions, problem finding and interests. Respondents were asked to underline text fragments and verbalize their explanation afterwards. This method was added to a traditional thinking aloud approach that is mainly used to evaluate student thinking while solving a problem or understanding a text (Van Someren, Barnard, & Sandberg, 1994).

Participants

Thirty-three students in higher secondary education (mean age = 15) participated in this study. They were drawn from eight different classes at six schools with a similar history curriculum in history. The Dutch history curriculum aims at teaching students to use a historical frame of reference combined with historical thinking (Van Boxtel, 2014). In lower secondary education, the asking of historical questions is not an explicit learning objective. As far as historical thinking skills are concerned, emphasis is on critical examination of historical sources and thus on asking questions that deal with usefulness and reliability of these sources.

Bearing in mind the relatively large differences in the historical knowledge and interest of students in the Dutch school system, we carefully selected 33 participants from a larger sample of 174 students. Working with the labour-intensive think aloud methodology, we had to select a number of students. Because prior knowledge and interest are important variables when it comes to questioning (Chin & Osborne, 2008), we used two criteria of selection in order to draw a representative sample from regular Dutch history classes with as much diversity in prior knowledge and interest as possible. We used a prior knowledge test about the Industrial Revolution, one of the topics in the national curriculum (8 items, α = .74) and an interest in history questionnaire (32 items, α = .92) to divide the sample of 174 students into groups of low interest/prior knowledge, medium interest/prior knowledge, and high interest/prior knowledge. We randomly chose 11 students from each of these groups. The groups were formed solely for selection purposes and to uncover diverse thinking processes; they were not utilized for comparisons. After getting parental consent, students were invited for an interview session (30-45 minutes). All student names in the results are fictional.

Introductory text

We composed a text about the historical topic Industrial Revolution (760 words, see Appendix). The function of this text was to introduce a new topic in the history curriculum (lesson-starter) and to trigger text-based interest and questions. Text-based interest is an 'emotional state aroused by specific text features' (Schiefele & Krapp, 1996). These text features can trigger situational interest that may give rise to questions (Hidi & Renninger, 2006). Texts containing an unexpected element, incongruence, or an appeal to one's imagination can stimulate situational interest (Brantmeier, 2006; Schraw, Bruning, & Svoboda, 1995). The text contained narrative and problematizing characteristics that we considered important for triggering situational interest

(engagement, and emotions such as indignation), cognitive disequilibrium (Graesser & Olde, 2003), and various types of questions. The text included a vivid eye-witness description by Friedrich Engels, the son of a German factory owner, of his visit to a nineteenth-century factory in Manchester and the poor conditions he saw there. The text then gives a (problematizing) comparison with the contemporary industrialization process of modern-day China and finishes with a concluding paragraph about the positive and negative consequences of the Industrial Revolution. Important historical information, such as dates and context, is left out in order to trigger knowledge deficits and historical questions.

Task and procedure

Students were asked to read the text and to underline text segments that were striking, (un)familiar or (un)clear to them. At each underlined text element, participants were instructed to verbalize (thinking-aloud) what they thought regarding this element, why they underlined it and to explain their thoughts. The instruction was written down for students and verbally repeated by the researcher (Appendix). At every underlined segment the researcher followed a protocol by using prompts such as 'what do you think?' to stimulate the student to think aloud and explain their thoughts. Because we were interested in the process of spontaneous asked questions, we did not instruct students to formulate questions during the reading of the text. Students indicated the theme of the text, explained their thoughts, and reacted to the prompting of the researcher (e.g., 'What do you think now?' and 'What do you mean by that?')

Coding system and analysis

We transcribed 33 protocols of students verbalizing their thoughts about striking fragments in the text. These data were divided into episodes. An episode is defined as 'all utterances of the student after underling a text segment'. We considered the moment of underlining to be a possible indication of a cognitive disequilibrium/deficit, historical or more present-day reasoning, or some type of affect. We defined 251 episodes (M = 7.6 per student). A coding scheme was developed to code verbalizations found within these episodes. An episode ends when the student stops verbalizing (or does not react to the researcher's prompts) and continues reading. Transcribed episodes vary in length from 2 to 25 sentences.

Each episode is coded on these three dimensions. We used the episode, not the student, as a unit of analysis because we wanted to get insight into the onset of questioning processes that occurs when students read a text about history and how spontaneously asked questions are related to these different processes. To analyze the protocols, we developed a coding scheme in order to label each episode on the following three dimensions: 1) prior knowledge (experiencing a deficit in, a contradiction or a correspondence with prior knowledge), 2) historical reasoning (contextualization, comparing, causal reasoning and argumentation) and 3) affective processes (indignation, interest, astonishment, empathy or boredom). Additionally, we coded each episode on the appearance of spontaneously asked question(s) (yes or no). Each dimension was coded in a specific way, so we discuss the analysis per dimension (Tables 1 to 4). Coding was done by two researchers and Cohen's kappa (reported in Tables 1 to 4) was used to calculate the level of agreement between the different raters using a sample of 45 (18%) episodes.

Coding scheme prior knowledge (Table 1).

Knowledge deficit was coded when a student explicitly stated his/her lack of knowledge about the topic by remarking that they don't know or understand or by asking a question that clearly reflects a lack of knowledge (e.g.: '*Manchester is in England, isn't it?* '). Only in this category of prior knowledge were (a certain type of) spontaneous questions seen as an indicator of the type of prior knowledge.

When no knowledge deficit appeared in the episode, it was coded with the codes 'knowledge conflict', 'association' or 'no prior knowledge'. A knowledge conflict means that students explicitly state that information in the text conflicts with prior knowledge. This could also mean that a

student compares this information with other information in the text. Association is referring to prior knowledge without verbalizing a knowledge deficit or contradiction. An association is expressed by the student by adding own knowledge, remembering lesson experiences, or information from a previous episode or text segment. An episode was coded as 'no prior knowledge' when a student only paraphrased the text or verbalized an affective reaction. A moderate Cohen's kappa (.63) was calculated.

Table 1

Codes, descriptions, and examples of prior knowledge (κ = .63)

Code	Description	Example
Knowledge deficit	Episode contains statements from the student that express a lack of knowledge, expressed in a question or by using the expression; 'I do not know'.	Well, I don't know. Apparently, England is more developed than Germany. But I don't know for sure, that's why I underlined it. I don't really understand it.
Knowledge conflict	Episode contains one or more expressions of prior knowledge that does not fit with the information in the text, according to the student. There is a contradiction with; - own knowledge - prior information from the text - own opinion, if supported with own knowledge - knowledge/information from the text.	Well, yes, it says that this Friedrich goes to his father's factory, a textile factory. But I don't understand, because it says in this sentence 'In a large, dark factory hall dozens of people are working; remarkably many women and children'. But I always thought it was the men that worked.
Association	Episode contains one or more expressions of prior knowledge related to the text segment. This prior knowledge can consist of; - own knowledge - preceding information from the text - lesson experience/recollection - own (life)experience.	Steam engines came; they began to work with steam. Things got more automated. How do you say that? That there was more productivity. That a lot more was produced. Yes, people are sad because they have to work, they can't do fun stuff and on Sundays they drink to forget.
No prior knowledge	Episode contains no statements that express prior knowledge related to the text-segment. - Information from text is repeated/paraphrased. - Episode only contains an affective reaction, opinion or judgment.	'10 to 12 hours' Um, that's too long. That, um. Well, I just don't think it's right that children had to work 10 to 12 hours a day.

Coding scheme historical reasoning (Table 2)

Episodes were analyzed based on the presence or absence of historical reasoning. (Cohen's kappa = .73). When students showed a present-day perspective by using their experiences or present-day standards in explaining their thoughts (e.g., only discussing present-day issues) this was coded as 'no historical reasoning'. But when a present-day issue was explicitly compared with the past or put into a historical context, this was coded as historical reasoning.

Describing the different types of historical reasoning in sub-categories was done by two raters *together* because only in some episodes different types of historical reasoning could be detected. In those cases, the raters discussed the main type of historical reasoning: contextualizing, comparing, causal reasoning and argumentation (Van Drie & Van Boxtel, 2008) and no kappa was calculated.

Table 2

Codes, descriptions, and examples of historical reasoning (κ = .73)

Code	Description	Example
No historical reasoning	Episode contains no use of a historical reasoning related to the text segment. Student judges a situation or event in the past from a present-oriented point of view (own experiences/values).	Well, that people weren't treated humanely in those factories. For example, that woman that wanted to comfort her child, or a child, and she immediately gets a fine because she's not working: I think that's really harsh. In this case I think of my own situation. I work 5 hours a week and I earn 3.85 an hour or something like that. And then I think 'they earned so little in the past.' That's just not right.
Historical reasoning	An episode contains use of historical reasoning related to the text segment aimed at giving meaning to a historical situation, event or phenomenon. The described information in the text is extended or made comprehensible by using one or more forms of reasoning: (1) contextualisation, (2) comparison, (3) causal reasoning, (4) argumentation.	
Contextualisation	Student constructs a historical context for the situation/event that is described in the text in order to make this situation more comprehensible.	The period, I think about 1700, 1800, when the steam engine appeared in England, I think. Yes, when things improved technically. That's what comes to mind.
	The episode contains statements about characteristics of a specific time, place or society.	Steam engine. Yes, that was the first invention of the Industrial Revolution (…) And the locomotive is derived from that. Yes, people worked six days a week in factories; streets were dirty and on Sundays they drank a lot.
Comparison	Student makes a comparison that concerns situations, events and phenomena in the past that are compared with each other or with present-day situations, events and phenomena. (A comparison between present-day situations is not considered historical reasoning; for example the comparison between China and present-day Europe.)	Well, because my idea about earlier times, for example the Golden Age (*17th century A.L.*), is that women didn't work as merchants or anything like that and they didn't work on ships. They were at home with the children. Men worked, so I think it's strange that now women and children have to work.
Causal reasoning	Student names causes and/or consequences of an event or situation that is described in the text.	Well, we now have faster transportation and people, yes, well, it changes, you know, we were able to move faster and, because of the train, we went to live in other places and we started to build cities. And that's what I mean with development. Progress, just like the Renaissance, for example.
Argumentation	Student gives arguments for or against a statement or interpretation, examines different arguments or interpretations.	I agree with the opinion that the existence of common people has improved. Um, well, the train came, so you can get anywhere within 3 hours. I think that's very important, that you can travel far (…) And what could we do without machines nowadays? Almost nothing. So that's my opinion. I agree with this.

Coding scheme for affect (Table 3)

First, we coded each episode on appearance of 'no affect' or 'affect' (Cohen's kappa = .90). Next, we coded the episodes that contained verbalizations of affect with the sub-categories interest, indignation, astonishment, empathy and boredom (Cohen's kappa = .79). These types of affect were inductively generated based on student utterances including words or expressions that refer to affective characteristics (e.g., like, fun, awful, etc.).

Table 3

Codes, descriptions and examples of affect (к = .90) and different types of affect (к = .79)

Code	Description	Example
No Affect	Episode contains no statement from the student that expresses emotion or interest.	Yes, children had to work too instead of going to school. So here you see again that they didn't have much choice. They had to work to survive.
Affect	Episode contains one or more statements from the student that expresses emotion or interest.	
Interest	Episode contains one or more statements from the student that express interest. The student uses words like interesting, fascination or curious.	Um, yes, I think that's because it interests me. I am curious about working conditions. Well, um, I think things like child labour, for example, are topics that I find fascinating. How do I explain that?
Indignation	Episode contains one or more statements from student that express indignation. The student uses expressions like 'not normal', 'shocking' or 'awful'.	Well, a child should be comforted when she, well, you have to comfort people when they aren't feeling good. And in this case it's not allowed. That's shocking.
Astonishment	Episode contains one or more statements from the student that express astonishment. The student uses expressions like 'unbelievable', 'strange' or 'surprising'.	I think that people at that time had to work very long hours. It's hard for me to believe that it was so bad at that time…and also because it concerns children, of course. That always really surprises me.
Empathy	Episode contains one or more statements from the student that express empathy. The student can imagine herself/himself in the situation that is described in the text segment.	That people really lived like that! I hate to think that I'd ever have to live like that. It's a bit like you are him and you're looking out the window and you see what he sees.
Boredom	Episode contains one or more statements that express boredom. The student uses expressions like 'boring', 'annoying' or 'not interesting'.	Well, yes, I just said that I don't think the subject we have now is a nice one. Because, well…it's probably important but I prefer to talk about things like World War II.

Coding scheme spontaneous questions (Table 4)

Spontaneous questions were categorized into substantive questions (descriptive, comparative, explanative, evaluative) and non-substantive (procedural) questions. We used the coding system from our earlier study (Logtenberg et al., 2011). Procedural questions function to understand the task and are mostly directed at the interviewer. The inter-rater reliability for the coding of spontaneously asked questions was calculated on a randomly chosen sample of 50 questions (Cohen's kappa = .76).

Table 4

Codes, descriptions, and examples of spontaneous questions (κ = .76)

Category	Code	Description	Example
Substantive	Descriptive	What, when, who, how questions that can support building a historical context or describing processes of change and continuity.	Manchester is in England, isn't it? What is this transition?
	Comparative	Questions that ask for differences and similarities in order to determine the uniqueness of historical phenomena.	What do we have now that they didn't have?
	Explanative	Questions that ask for explanations of historical phenomena, why questions, what were (short-term and long-term) causes and/or effects?	I would like to know why many women and children worked.
	Evaluative	Questions that discuss the significance of historical phenomena that foster discussion about the topic by asking for a judgment/opinion.	What was wrong with the people themselves during the Industrial Revolution?
Non-substantive	Procedural	Questions about the task or procedure directed at the interviewer or that support the thinking process.	How do I explain? Do I have to underline this? What do I think about this?

Results

In total, 251 episodes were analyzed to answer the research question. First we describe the appearance of thinking processes and spontaneous questions. Next, we describe episodes with and without spontaneous questions and the co-occurrence with the dimensions; prior knowledge, historical reasoning and affect.

Students' thinking processes in the episodes

Table 5 shows the results of the analysis of the episodes in which students verbalized their thinking after they underlined part of the text. We observed that prior knowledge was present in 74% (f = 186) of the episodes. In 23% (f = 57) of the episodes students expressed a knowledge deficit and in 8% a knowledge conflict (f = 21). 108 (43%) episodes contain an association. We found that in 120 (48%) of the episodes students verbalized historical reasoning, mainly contextualization (f = 81, 32%) and comparison (f = 26, 10%). In 51% (f = 128) of the episodes students showed an affective reaction, mainly indignation (f = 59, 24%) and astonishment (f = 27, 11%) about the poor working conditions and child labour.

Table 5

Frequencies and percentages of the dimensions prior knowledge, historical reasoning and affect

Prior knowledge	*f* (%)	Historical reasoning	*f* (%)	Affect	*f* (%)
Knowledge deficit	57 (22.7)	Contextualisation	81 (32.3)	Interest	24 (9.6)
Knowledge conflict	21 (8.4)	Comparison	26 (10.4)	Indignation	59 (23.5)
Association	108 (43)	Causal reasoning	8 (3.2)	Astonishment	27 (10.8)
		Argumentation	5 (2.0)	Empathy	14 (5.6)
				Boredom	4 (1.6)
Prior knowledge	186 (74.1)	Historical reasoning	120 (47.8)	Affect	128 (51)
No prior knowledge	65 (25.9)	No Historical reasoning	131 (52.2)	No Affect	123 (49)
Total	251 (100)		251 (100)		251 (100)

Students' spontaneous questions in episodes

A total of 129 questions were spontaneously asked when students verbalized their thinking. Ninety-seven substantive questions (75%) were content-related and 32 procedural questions were asked. Most substantive questions were descriptive (*f* = 73, 57%) and were asked while reading the narrative text part that dealt with working conditions (see Appendix). Two comparative (1%), 14 explanative (11%) and 8 evaluative (6%) questions were spontaneously formulated.

Table 6 describes the co-occurrence of substantive questions (descriptive, comparative, explanative or evaluative) and the characteristics of the episodes (prior knowledge, historical reasoning and affect) in which they occurred. In 63 episodes (25% of a total of 251 episodes) students asked one or more substantive questions that can be related to the different thinking processes. We found that when questions were formulated, they were often embedded in episodes with a knowledge deficit. These questions were often very close to the text. Almost half of the substantive questions was connected to historical reasoning, mainly contextualization. With respect to affect, it appeared that almost half of the questions were embedded in episodes that included affect. Questions characterized by affect were mainly associated with interest, indignation, and amazement.

Table 6

Frequencies and percentages of episodes (in terms of prior knowledge, historical reasoning and affect) in which one or more questions are asked and frequency and percentages of substantive questions.

Dimension	Type of thinking processes		Episodes with substantive question(s)	Number of substantive questions
Prior Knowledge	Knowledge Deficit		41 (65%)	69 (71%)
	Knowledge Conflict		2 (3%)	4 (4%)
	Association		15 (24%)	16 (17%)
	No Prior Knowledge		5 (8%)	8 (8%)
		Total	63 (100%)	97 (100%)
Historical Reasoning	Historical reasoning		28 (44%)	44 (45%)
	No Historical reasoning		35 (56%)	53 (55%)
		Total	63 (100%)	97 (100%)
Affect	Affect		26 (41%)	41 (42%)
	No Affect		37 (59%)	56 (58%)
		Total	63 (25%)	97 (100%)

Below, we illustrate with examples how students' questions arise from different processes. We also give some examples of episodes that contain a potential onset for questions (e.g. a knowledge deficit or indignation) in which no spontaneous question was formulated, to better understand when questions aren't formulated.

Questions triggered by prior knowledge

With regard to prior knowledge most substantive questions (71% of all substantive questions) were asked in episodes in which students verbalized a knowledge deficit. Only 4% of all substantive questions were asked in episodes with a knowledge conflict. 17% of the questions were asked in episodes in which students verbalized associations.

Questions embedded in a knowledge deficit were often asked in episodes that did not contain historical reasoning nor affective responses. In 41(72%) of the 57 episodes with a knowledge deficit spontaneous questions were formulated. For example, when reading the text fragment 'At a distance poorly dressed men are watching' (see Appendix), Jody asked:

> 'What has that to do with this? I wonder, what kind of men are they?'

Reading about 'rattle and trampling sounds', Rose asked:

> 'What is the meaning of those rattle and trampling sounds? Where does it come from, that sound?'

Victor posed a question about the term 'weaving looms':

> 'What are weaving looms? Are those ... looms ... Yes, I do not know what it is. It
> is probably for the weaving?'

In coding students' thinking processes, we found that 21 episodes showed a knowledge conflict (see Table 5). Only 2 (10%) of these 21 episodes contained questions. In both episodes, students stopped reading at the part of the text where the comparison with China was made. Students were confused about this comparison. '*So this text is about something else?*', Jody asked, referring to the text section about current working conditions in a Chinese factory. Jody thought the situation concerned a development in the past. He knew about past developments and contextualizes by stating that these where '*200 or 300 years ago.*' At the same time, he was astonished reading about the comparison with China.

In 15 (14%) of the 108 episodes with expressed associations, questions were spontaneously asked. These episodes often also contained an affective response. These questions were mainly aimed at the questioner self while thinking aloud and reacting on the text. For example, while reading about the dirty canals, Eric said:

> 'This is not normal, that the water is so black and smelly (..) Well this is bad for
> the people, isn't it?'.

Eric then referred to another fragment earlier in the text "Friedrich breathes in the smell of the steam engine" and said:

> 'Well, it was like that in the past, that's bad for him and he probably hasn't done
> that before. You didn't have this before the Industrial Revolution started, with all
> those factories and so on. That's the cause (of the IR) so to say, that's why the city
> is full of dirt.'

Besides his indignation about these environmental issues, Eric knew that this issue is a consequence of industrialization and showed prior knowledge about environmental issues with an association accompanied by a question. On the other hand, his indignation about these environmental issues could be explained by a present-day perspective through which he tried to imagine how these issues were new for people living during the industrial era.

In several episodes where students conveyed a conflict in knowledge, a sense of perplexity was evident. However, despite this confusion, the students refrained from articulating a question. For example, George underlined the text fragment: 'Impressive', Friedrich thinks, 'A lot more modern than our Essen station in Germany.' George said:

> 'Well, that suddenly a German is standing at an English (Manchester) train
> station. I think that's unusual. Um, well it is in the time of the Industrial
> Revolution, but I didn't know that foreigners were already going to England,
> especially Germans. Um, well, I don't know exactly, I just thought it's unusual, I
> don't know. Well, I didn't exactly know that, say, Germans, other people, went to
> England. I thought it was America. Well, America was the new world. So, I think
> if they wanted a better life or something, then they'd go to America, not to
> England.'

George verbalized a knowledge conflict and tried to make sense of it by historical contextualization (without affective responses) but posed no spontaneous questions.

Another example of an episode with a knowledge conflict, historical reasoning and an affective reaction came from Sylvia. She underlined the text fragment 'remarkably many women and children' and reacted:

> 'The text describes that Friedrich goes to his fathers' factory, a textile factory. But I do not understand. I always thought that particularly the men worked. I didn't expect that women and children to work in a factory. Women took care of housekeeping and men earned money.'

Then she tried to understand this situation by contextualising and comparing this situation.

> 'My idea of the past is that, for example during the Golden Age, women also did not work as traders or work on ships. Women were at home with the kids. Men did those jobs and I think it is strange that now the women and children must work.'

Sylvia engaged in historical reasoning by comparing the situation described in the text with her knowledge of another historical period, specifically the seventeenth century. In this particular episode, Sylvia did not draw upon her prior knowledge to comprehend the reasons behind the high number of women and children working in a factory. On a more profound level, Sylvia's perplexity delved into the historical matter of continuity and change, questioning the factors that change and those that remain constant over time. In pre-industrialized society, it was quite common that children contributed to the family income. The inquiry into why things undergo change is implicit in the student's response, although she did not explicitly articulate a question.

Questions arising from historical reasoning

In 28 (23%) of the 120 episodes characterized by historical reasoning students asked one or more questions. 44 out of a total of 97 substantive questions (45%), mainly descriptive questions, were mainly asked in episodes with contextualizing.

In one episode, perplexity was triggered by the sentence in which Friedrich says that it (Manchester) was more modern than Essen (in Germany). Victor verbalized his lack of knowledge and asked: '*Were these two connected or something?*' and '*Was there something special about Germany, even then?*' He posed inquiries regarding the broader context of developments in Germany, and to facilitate this understanding, he sought information about the specific time period covered in the text. He stated, '*This is at the end of the 18th century*' and asked '*This is 19th century, isn't it?*' From the perspective of historical reasoning, these questions can be understood as an attempt to build a historical context in order to understand the difference between Germany and England. The questions were directed towards obtaining information that assisted Victor in situating the historical situation within the framework of both time and place.

Alice tried to contextualize and source the text itself. When reading the name Friedrich, she immediately asked ; 'Is it a story? Or what kind of story is it?' 'Yes, is it a source or something like that, regarding the Industrial Revolution? I don't know whether this is a primary or secondary (source)or what it may be'. She posed these questions and verbalized a knowledge deficit. She said 'I do not know who that man, Friedrich, is'. These questions may aid in achieving a understanding and contextualizing the events delineated in the text.

These examples show that spontaneous questions were part of historical reasoning, mainly supported by using knowledge that is not in the text. However, in 92 episodes characterized by historical reasoning no questions were asked. For example, regarding the last sentence of the text: 'Some (historians) think that the welfare of people decreased because of the Industrial Revolution, while others think that the lives of ordinary people improved because of it.' Sylvia underlined this sentence and said:

> 'I think this is a good position, because this is right. Children are behind their computers too long, they become fat, and they eat candy, and so on. And, during the Golden Age (17th century), for example, you did not have all those things. Children played outside and it was safer, there were no cars on the street. So I agree, but also with the other part of the sentence'.

Sylvia continued:

> 'In the past there was a big difference between poor and rich. When you were poor, you didn't have a future. But now that's normal, in Europe. There is no big difference between the rich and the poor. Poor people have a future now. Children from a family supported by social security can go to school and can go to university if they want to. So this revolution has advantages and disadvantages. I think, what if this revolution did not occur, I wouldn't be at school nowadays, you know?'.

This example of Sylvia showed how a student 'solved' the problematizing part in the text by reasoning historically by finding arguments regarding the advantages and disadvantages of industrialisation. This probably explains why no question was posed.

In conclusion, our in depth analyses of episodes revealed that questions can be embedded in historical reasoning, mainly in terms of contextualising but also by causal reasoning and argumentation. Students' historical reasoning and questioning is supported by prior knowledge. In episodes with historical reasoning where no questions are asked, students do not experience enough perplexity to formulate a question or they 'solve' perplexity by using prior knowledge and historical reasoning. However, some of this knowledge and reasoning is still quite naïve and could be deepened by further questioning.

Questions triggered by affect

With regard to affect 41 (42%) of the questions were asked in 26 (20%) episodes with affect (mainly interest, indignation and astonishment). Often these questions reflected a moral judgment because of taking a present-oriented perspective towards the situation or event described in the text. One of the students, for example, showed indignation about the fact that a woman who comforts a crying child gets a fine and asked '*Why does she get a fine?*'.

In some cases, affective responses such as indignation or amazement were succeeded by a question, after which the student attempted to contextualize or elucidate the situation or event in the text . For example, when reading about the working conditions in the factory, Carl expressed his indignation with a question: '*People are allowed to talk, aren't they?*' After this he contextualized the situation through a more extensive description of the working conditions in those factories:

> 'Taken into account the whole text and what we discussed in the lesson, people worked in really bad conditions, and many died in the factories. Children had to work because they were able to crawl between all those machines.'

In this episode, the question was the start of a historical reasoning. After reading about working conditions, a question that reflects emotion and a present-day perspective was asked. The question was followed by verbalizing prior knowledge in which the student tried to create understanding of the historical situation without losing his feelings of indignation.

Finally, we found episodes with an affective reaction without historical contextualization and no spontaneous questions, mostly expressing indignation about and empathy with working conditions. Eva, for example, read "In a large, dark area many people are working - remarkably many women and children." She said:

> 'This is pitiful, those people working in dark unhealthy circumstances. And even children work there. It says it was "dusty and stuffy over there. The noise is deafening and 10 to 12 hours a day." That's not normal, it's not healthy for a child and neither for a woman. They hardly see any daylight. I wouldn't want that in any case. This is striking to me. I think this is sad and it also interests me. Things about poor countries, I can empathize with that.'

This type of reaction to the description of working conditions in the text only reflected an affective process.

In sum, students showed affective reactions regarding the working conditions described in the text. In some episodes, questions emerged either embedded within or immediately following an affective response. Questions were an expression of affect, for example, indignation or amazement. When no questions were asked, the affective response was followed by historical contextualisation that 'solved' the affective perplexity. In other episodes the affective reaction was not accompanied by a question, probably because students were not used to pose this type of questions (that express indignation or empathy) in a classroom context.

These examples show that experience of a knowledge deficit, but also historical reasoning and affect can be regarded as important characteristics of question asking. Often these thinking processes co-occur and are intertwined.

Conclusion and discussion

In this study we described the thinking processes underlying questioning and spontaneous questions of secondary school students who read a historical introductory text. We were interested in the processes that characterize questions that students spontaneously formulated. In understanding these thinking processes, we focused on the first two stadia of a general model of questioning (van der Meij, 1994) and tried to enrich this model with domain specific 'production rules' of questions. According to general models of questioning, the onset and formulation of questions is characterized by a cognitive conflict or a knowledge deficit. In addition to these general components, we were especially curious about the domain-specific elements in questioning, i.e., the role historical reasoning and affective processes might play in the onset of questions in the domain of history. First, we examined thinking processes through student verbalizations about prior knowledge, historical reasoning, and affect. Then, we used these processes in order to analyze episodes with spontaneously asked questions.

Thinking processes

Prior knowledge appeared to be prominent in thinking processes the students engaged in. We found that students often stopped reading when terms or statements in the text triggered verbalizing associative knowledge. In almost a quarter of all episodes, students verbalized a knowledge deficit. However, students did not often express a knowledge conflict, whereas in general questioning models such conflicts are considered important sources of student questions (Graesser, 1993). This could also be caused by the fact that students have little prior knowledge and the text (re)introduces the topic to them.

In half of the episodes students reasoned historically, often by constructing a historical context for the situation or event described in the text (contextualization). This suggests that students, when reading a text, try to make sense of the historical context (Huijgen et al, 2018).

With respect to the role of the affective dimension in thinking, we conclude that in explaining their disequilibrium or reason to stop reading, students verbalize emotions and interest. We found affective reactions in about half of the episodes. Indignation and astonishment about the working conditions were particularly triggered by the text. This supports our idea that the disequilibrium students experience often is not only cognitive, but also affective. Events or situations described in the text conflict with what students think is correct or normal. In the domain of science, it is well-known that students can experience a cognitive conflict between scientific ideas and ideas based upon everyday experiences, perceptions and physical sensations (e.g., Limón, 2002). However, in the domain of history, conflicts may occur more on the level of values and norms, and emotions can play an important role. Emotions are clearly present when students learn about history (Rüsen, 2007; Logtenberg, 2012; De Leur, 2018).

Summarizing, the activation of prior knowledge, the realization of a knowledge deficit, historical reasoning, the verbalization of emotions such as indignation and astonishment are important components of the disequilibrium students experienced when reading the introductory text about the Industrial Revolution. Therefore, these components are useful to describe the onset of questions in history.

Spontaneous questions

Analysis of episodes with spontaneous questions shows that questions are especially asked when students experience a need for more information (and thus a knowledge deficit). There seems to be a difference between not knowing something and knowing what specific type of information is required to gain a better understanding of a 'specification of ignorance' (Wineburg, 2001). This need for information is sometimes grounded in the attempt to contextualize, which is an aspect of historical reasoning (Huijgen et al., 2017). Many spontaneously asked questions were found in episodes with historical reasoning. In some of these episodes, questions were the start of a historical reasoning or embedded in historical reasoning. Astonishment and indignation - when combined with the attempt to contextualize- can also characterize a question, although these questions often contain presuppositions reflecting a judgment or a present-oriented perspective. Indignation and astonishment were present in a third of all episodes, but only in a minority of these episodes students asked questions. Hence, these emotions did not lead to the initiation of questions.

Typical historical perplexity can be seen in episodes where students wonder about rapid developments, or the otherness of the past. We found several examples of episodes in which students asked questions when they reasoned or tried to reason about continuity and change, the particular historical context, differences and communalities between past and present or between different periods in the past, and even some instances of reflection on who wrote the text. These are important aspects of historical thinking and reasoning (Logtenberg, 2012) and are precisely the type of questions scholars in the field of history education see as important student questions when doing history. For example, the perplexity and questions students verbalized showed similarities with questions that Seixas (2006) characterizes as 'the questions of historical consciousness'. In answering such questions students and teachers should consider historical thinking concepts, such as historical significance, continuity and change, cause and consequence, historical evidence, historical perspectives and the ethical dimension of history (Seixas & Morton, 2012). Overall, the integration of general questioning models with domain-specific elements in questioning aids in comprehending the initiation and questioning patterns of students. This skill is often regarded as a fundamental activity in the history classroom.

Limitations and further research

A possible limitation of this study lies in the research methodology. The advantage of the method that let students decide to stop reading and explain their thoughts is that it allowed us to register affective student reactions on specific text segments. Affect, particularly, may be a brief and fleeting phenomenon and would not have been expressed after reading the whole text. On the other hand, this method may disrupt the reading process and may have caused students to mark fewer elements in the last section of the text because they became tired of explaining their thoughts every time they marked a text segment. It is also possible that students refrained from marking elements of which they knew nothing, being afraid to show that they were unable to discuss these issues. Alternatively, as noted before, it's possible that students were unaware of what type of knowledge they were lacking.

Furthermore, the prompting after each utterance could have influenced reasoning processes, student thinking and the asking of spontaneous questions. The researcher asked questions for explanation that caused students to be placed in 'answering mode', and therefore they did not automatically start asking questions. They were not instructed to formulate questions.

Since we only used an introductory text and a text about one historical topic, further research is needed using a variety of texts (e.g., explanatory texts or primary sources) and topics to support our findings that in the domain of history, prior knowledge, affect and historical reasoning are important components of the processes that students experience when reading a text, and that affect and domain-specific reasoning are also important in the development of questions.

Further research could also continue to explore differences and communalities in the ability to ask historical questions between students with different levels of prior knowledge and interest in history. Because of the small sample size in this study, we were not able to draw conclusions about these differences.

Furthermore, while making sense of historical substantive student's questions may be influenced by their socio-cultural backgrounds, communities and identities (Epstein, 2016). For example, students may ask questions when they feel that the narrative they are reading differs from the narrative they are being told at home or in the community to which they belong. Furthermore, prior knowledge, interest and affective responses – that often trigger questions - may be different for students with different socio-cultural backgrounds and identities. Quantitative studies could look at the effect of prior knowledge, interest and epistemological beliefs, but also of the extent to which a historical topic is important for students' identity on asking questions. However, gaining insight into these processes in large groups of students is a major task. Case studies could also be carried out in which students, who differ on several characteristics, think out loud, just like in our study.

In this study we focused on *spontaneou*s questioning, and we found that students do ask questions (triggered by the text) but also expressed many thoughts reflecting a feeling of perplexity that could lead to a question. Hence, exploring how students pose questions after receiving instruction to do so is an interesting idea for further research.

Practical implications

It is important that students are enabled to ask questions in the history classroom. We think that knowledge of the onset of a question, i.e. the thinking processes underlying questioning, provides us with more information in determining the *quality* of a question, and hence the quality of the thinking processes. In educational practice, the assessment and evaluation of the quality of the questions students ask is seen as useful teaching method (e.g. Dori & Herscovitz, 1999). Determining whether a question is a 'good' question can be done by looking at the disequilibrium the questioner experiences and whether the questioner is able to formulate a question out of this experience.

The findings that students do not often formulate a spontaneous question when they experience some form of disequilibrium, and that affect and historical reasoning are important components of students' onset of questioning, are not only important for research on learning history and on student questioning, but also for educational practice. Focusing on history education, historians and history educators consider question asking as an important ability. First, in history lessons students could be stimulated to articulate their thoughts about what they consider strange or unjust before being instructed to formulate questions (e.g. Ciardiello, 2007). When students ask questions that reflect affective responses as a result of taking a present-day perspective, the teacher has the opportunity to transform the taking of a present-day perspective into a more historical perspective, for example by modeling or providing information with which students can investigate why people in the past behaved as they did. Second, students could be stimulated to contextualize what they read in a text. Contextualization is an important activity for formulating descriptive, comparative and explanatory questions about historical phenomena and also for dealing with indignation and astonishment (Huijgen, 2017). The present study contributes to the debate about how students can be supported in problem-finding and formulating questions they are interested in or that are meaningful for them. Simultaneously, their question asking offer significant opportunities for building historical knowledge and improving historical reasoning skills.

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Appendix

Instruction and introductory text (760 words)

On the next page you will find a text about a topic in history. Read this text carefully. Mark the text segments where you notice striking things, something funny, strange or interesting. It is also possible that you may recognize something, do not understand something or want to know more about something. In short, mark everything in this text that attracts your attention. Underline everything in the text that makes you think 'this is remarkable, this is interesting, I do not understand this, this feels strange, this is fun, or I want to know more about this.' Underline anything you want to. Read the underlined text-segment aloud and say what you think, what you feel and why you underlined this segment. You can say anything you want to; I want to hear what this text means to you, what attracts you. Anything you say is fine with me. When you underline something, I will ask you to explain why you underlined it.

The Industrial Revolution

The platform of the brand new train station in Manchester is packed with people; wealthy ladies with their children, gentlemen in high hats. In the background a steam locomotive is still puffing. At a distance poorly-dressed men are watching, waiting for a chance to give directions to rich train passengers in the big city. Friedrich breathes in the smell of the steam engine. He observes the modern station in admiration, waiting for a chance to collect his luggage. 'Impressive', Friedrich thinks, 'A lot more modern than our Essen station in Germany.'

'Jungherr Engels?' A large man is walking towards him. 'My name is Peter; I'm the supervisor in your father's factory. A carriage is waiting for you.' A little later Friedrich is travelling through the streets of the big, grey city. Everywhere he looks he sees chimneys fuming endless trails of smoke. From the buildings lining the streets, constant rattle and trampling sounds emerge from small windows. Narrow streets all around are filled with dirt. Even the water in the wide channel is black and smelly. Friedrich's thoughts wander back to home, where, fortunately, it is not as dirty and crowded. But here in Manchester, factories are bigger and the machines are more modern. That is the reason his father, a successful textile baron, had sent him here. Here, in his father's factory, he has to finish his education.

The carriage stops in front of a large, stone brick building. Friedrich follows Peter through the factory gate into a large hall. His father has spent a fortune on steam engines that drive the weaving looms. Friedrich and Peter walk upstairs to the first floor, where the weaving looms are. In a large, dark area many people are working – remarkably many women and children. It is dusty and stuffy over there. The noise is deafening. 'How many hours a day do they work?' Friedrich asks. '10 to 12 hours!' Peter screams.

Suddenly, Peter jumps between the machines. At one of the weaving looms a women is comforting a crying child. Peter pulls her roughly back on her feet. 'A fine for you! Talk in your own time!' The woman quickly gets back to work. The child has already disappeared. 'If the spools are not changed in time, we have to restart the machine. That takes a great deal of time, and time is money.' Peter explains. 'You have to keep them working'. Friedrich looks around at the toiling people. It feels strange becoming the boss of this.

At night, after a long and tiring day, Friedrich writes in his diary: 'The English entrepreneurs only think of making money. Workers are not people in their eyes but economic entities. Never have I seen such egoism. Factory owners do not realize that relationships other than buying and selling exist.'

This was the situation in textile factories in Manchester during the period of the Industrial Revolution that started in England. Is the situation really something from the past? Read the text below.

'To deliver orders in time, workers are working seven days a week, sometimes even 20 hours a day, for 5 cents an hour. Overtime is not paid. The girls are so tired that they fall asleep during their breaks. But they do not have a choice, unions are prohibited and those who protest or work too slowly can expect a fine or the sack. The labourers live on the factory premises and sleep 12 to a room.'

This is about a jeans factory in China, 2008! Jasmine, a 16-year-old girl, works there. A documentary has been made about her and the work in the factory.

Just as happened in Europe in the past, the rise of industry in China caused a drift from the countryside into the cities. Because of mass-production the price of products lowered, so that workers were able to buy products too. The process of industrialization probably shares similar traits with conditions such as those in modern China and earlier Europe. In England it took some time before the working and living conditions of the workers were improved. However, industrialization also brought technical progress, faster production and useful inventions, such as the railway.

Historians think that the Industrial Revolution is one of the most important events in history because that period was a fundamental transition to modern times. However, they disagree about the effects of this development on common people. Some think that the welfare of people decreased because of the Industrial Revolution, while others think that the lives of ordinary people improved because of it.

Context matters in history textbook studies: A call to address the socio-political landscape of textbook production

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ABSTRACT

History textbooks are a tool of nation-building and often the only account of particular events, people and issues to which students will be exposed. This is one reason why it is important to examine, not only their content, but the context of their production. Research attention needs to be directed not only at disentangling the logics of textbook content, a purpose that dominates the field, but also at the social and political contexts of their development, including their production (publishing and authorship) and the processes by which they receive official approval. This work analyzed 100 history textbook studies in order to identify current trends in textbook research. This article focuses on one of the four major findings of the study: textbook studies often focus on the content of the textbook in isolation from the socio-political landscape of textbook production. The socio-political landscape refers, but is not limited to, the influence of local and geopolitics; the influence of the state, evident primarily in the official approval processes employed by governments; the economic dimension and publication parameters; and authorship factors. Among the relatively few studies that address the socio-political landscape, the authors often employ a historiographical or comparative perspective. The historiographical perspective, which is dominant, offers an analysis of textbooks over time in order to reveal both continuities and changes in the historical narratives produced by their authors. One example is a study by Yeow Tong Chia (2013), who examines conceptions of 'Chineseness' and China in Ontario high school history curricula and textbooks in the post Second World War to the 1980s period. More broadly, the paper locates the Ontario textbooks in the international context of the western-centric perspectives that were prevalent following the Second World War. The comparative perspective analyzes textbooks across regions in one historical moment. For example, Jason Nicholls (2006) addresses the role of national contexts in determining how the Second World War is portrayed in textbooks found in the United States, Italy, Sweden, Japan, and England.

Introduction

History textbooks are viewed as a crucial vehicle for representing a nation to that nation's young citizens (Grever & van der Vlies, 2017; Ngo, 2014; Sakki, 2014). This becomes particularly clear when totalitarian states rewrite textbook content to suit changing political circumstances. For example, authorities in Hong Kong recently erased references in new textbooks to the fact that it was a colony of Britain from 1898 to 1997 (Oung, 2022, pp. A1, A11) and Russia is currently reviewing its history textbooks with the aim of making them more "patriotic" by removing references to Ukraine (Dixon, 2022, n.p.). In many educational jurisdictions around the world, textbooks are either selected or developed under government direction and then officially approved for classroom use. They are thus deemed to contain "official knowledge" (Apple, 1999) that is considered suitable to be conveyed to the next generation of adult citizens. Often, they are accepted uncritically by their student readers. As one Canadian secondary student declared, "You can't disagree with it . . . it's what you are supposed to learn" (Seixas, 1994, p. 93).

Maria Repoussi and Nicole Tutiaux-Guillon (2010) note that textbooks are "the dominant translation of the curriculum in schools and they continue to constitute the most widely used resource for teaching and learning" (p. 156). However, textbook status and use are more nuanced than Repoussi and Tutiaux-Guillon acknowledge. Stuart Foster (2011) reminds us that "the production, solution, deployment, and status of history textbooks differs considerably in different countries" (p. 5). Foster's point is supported by the work of other scholars (e.g., Hein & Selden, 2000; Nicholls, 2006; Pingel, 2010; Vickers & Jones, 2005). The United Kingdom and some European Union nations are at one end of a continuum because they do not have authorized textbooks. Teachers are free to choose their textbooks, or, for that matter, to choose not to use them at all (Haydn, 2011). At the other end of the continuum, Terry Haydn (2011) refers to "the reverence, status and importance attached to history textbooks that can be found in countries such as Greece and Japan" (p. 83). As Ogawa and Field (2006) point out:

> [T]he Japanese national government directly monitors, supervises and censors textbook content, a policy pursued from the nineteenth century, schoolbooks provide authoritative statements on national policy and ideology. In the case of Japanese history textbooks, the content portrays the preferred history of the nation, especially with regard to the treatment of World War II and its aftermath. (p. 44)

While it is hardly unexpected for history textbooks to portray "the preferred history of the nation," Japan's textbooks have been the focus of national and international attention due to the lack of

acknowledgement of, in particular, the harsh treatment of prisoners of war and the exploitation of the "comfort" women during the Second World War. This topic has been extensively discussed in the literature (e.g., McCormack, 2000; Nozaki, 2008; Yoshida, 2007; Yoshiko & Hiromitsu, 2000). Regardless of how and to what extent history textbooks are used or not used in classrooms, textbooks are cultural artifacts, "a public form of knowledge indicative of the general and overall discourse permeating a society at a given time" (Morgan & Henning, 2013, n.p.).

Textbook studies have been central to the recent work of *Teaching History for Canada's Future* (THFCF), a pan-Canadian research project funded by the Social Sciences and Humanities Research Council of Canada. The Curriculum and Resources Cluster within this project has a mandate to examine the curriculum and key resources in each of Canada's 13 provincial and territorial educational jurisdictions. As a means toward preparing for this end, we conducted an analysis of history textbook studies.

We gathered a comprehensive corpus of 100 journal articles and book chapters published between 1991 and 2021 in English and French to identify current trends in textbook studies. We systematically examined key social studies, history education, curriculum studies, and media studies scholarly journals and prominent edited collections to identify relevant research based on contribution to the field of textbook analysis.[1] The list is not exhaustive as our intent is to offer examples of relevant literature rather than a complete list of textbook studies conducted in the past three decades. We acknowledge that we include a disproportionate number of studies from the Global North; a factor of language barriers and the dominance of English language academic journals.

The framework for our analysis was presented to the THFCF Executive Committee and validated by it prior to commencing the study. The process of gathering and analyzing data occurred from 2019 to 2022. All researchers read articles deductively, applying a predetermined analytical framework to critically assess an author's epistemological claims; theoretical framework; core methodological assumptions; application of methods, including selection criteria; the strengths and limitations of the methods employed; and the findings. In addition, they judged each article on its overall strengths and limitations, as well as its contribution to the field. After analyzing individual studies, the research team identified the prevalent trends across the studies reviewed. The researchers shared and assessed their work to maintain validity and transparency.

We note that our focus is on studies of elementary and high school textbooks (Kindergarten to grade 12 in most of North America, to Secondary IV in the province of Quebec and A-levels in Britain), rather than those used in postsecondary courses. This is because the content of the elementary and high school texts is typically vetted by educational authorities for wide use in classrooms, often across a nation. Postsecondary textbooks are far more idiosyncratic since they are selected, and often authored by, individual instructors or instructor collectives. One must exercise caution in any attempts to generalize about them and thus, they are far less frequently studied. We note, as well, that publishers' development processes and marketing strategies are very different at the two levels.

Following the review, we identified four areas that require greater attention in history textbook studies. First, textbook researchers need to be more explicit about their methodologies and methods. Second, they need to consider a holistic approach. The third finding concerns the paucity of studies related to classroom use and particularly how textbook content is mediated by both teachers and students. This article focuses on our fourth major finding which is that studies often are concerned with textbook content in isolation from the socio-political landscape of production, inclusive of historical, curricular, and economic contexts. Studies might ask, for example, how do textbooks differ between totalitarian and democratic nations or what entities within an educational jurisdiction control curriculum policy, what are the means employed and what is the nature of the resulting textbooks? As Elie Podeh (2000) reminds us, "since textbooks are not compiled in a vacuum and their contents reflect trends in society and culture, the texts can be assessed only within the framework of their historical context" (p. 69). Jordan Reed (2018) argues, the field "needs to be re-centered on the textbook and the methods of book history" (p.

398) in order to "look at the intricate processes that created these textbooks—publishers' pecuniary motives, authors' intent, and the books' materiality" (p. 412).

We took note of Eckhardt Fuchs' (2011) assertion that the field of textbook research is mired with studies taking the research object, the textbook, as "its point of departure" rather than "various thematic, methodological, and disciplinary contexts" (p. 17). Most history textbook studies do not offer substantive attention to contextual elements – the inherent socio-political landscape. The socio-political context of textbook production refers to, but is not limited to, the influence of local and geopolitics, government objectives, authorship, and publication, each of which contributes to shaping a textbook at a given time in the production process. Official approval processes must also be taken into consideration. This article offers a comprehensive review of history textbook studies and demonstrates that such context matters for the field.

The socio-political context: Historiographical and comparative approaches

Some scholars do discuss the socio-political context in which textbooks are produced (e.g., Carrier, 2018; Naseem, 2014; Oteiza and Achugar, 2018). For example, when analyzing the inclusion/exclusion of Chamorro women from Guamanian history textbooks, Perez Hattori (2018) explores the textbook industry in the 1990s, including her own authorship, as a source for reinforcing western traditions of what counts as knowledge.

We found that among those relatively few studies that address the socio-political landscape, the authors often provide a historiographical or comparative perspective. It is clear from the dataset that a historiographical approach is the more common. Such an approach offers an analysis of textbooks over time to reveal both continuities and changes in historical narratives produced by their authors (Podeh, 2000, p. 69). For example, Yeow Tong Chia (2013) examines conceptions of China and 'Chineseness' in high school history textbooks in Ontario, Canada. He found that textbooks perpetuated the western-centric views of Chinese history that have been prevalent internationally. His study points to the 1940s in which seemingly western-inspired democratic reforms in China were first included in the Modern World History course and to 1980's textbooks which refer to China's economic prominence as an entry into western modernity (pp. 203–207). Similarly, Clark (2007) offers a historiographical investigation of the treatment of Aboriginals and Aboriginal issues (using the language of the 1982 Constitution Act) in Canadian school history textbooks. She demonstrates that textbooks from the early to mid-twentieth century often treated Aboriginal peoples with "paternalism and repugnance" (p. 95). By the turn of the 21st century, Clark found that textbooks reflected some of the socio-political changes towards greater rights for Aboriginal peoples; e.g., Royal Commission on Aboriginal Peoples (1996) and the Supreme Court Delgamuukw ruling (1997), among other events. Textbook depictions of Aboriginal peoples became more positive over time but still failed to acknowledge colonial relationships of power, thereby 'othering' them within a dominant narrative of progress (pp. 103–111).

Rather than a historiographical approach, other scholars, albeit again limited in numbers, take a comparative approach to socio-political analysis. A comparative approach analyzes textbooks across regions in one historical moment. For example, Simona Szakács (2018) examines how current textbooks construct the concept of 'Europeanness.' She found, given the geopolitical landscape, that most European countries emphasize post-Second World War ideals of human rights and global citizenship, whereas Russian and Polish textbooks emphasize nationalist citizenship as part of an ongoing postwar reclamation in opposition to their western neighbours. While the transnational politics of history is central to Szakács' study, the sheer number and breadth of textbooks results in insufficient information regarding the politics of governance over textbook content in each region. Similarly, and perhaps unsurprisingly, Jason Nicholls (2006) reveals how national contexts play a significant role in determining how the Second World War is portrayed within textbooks in the United States, Italy, Sweden, Japan, and England. He found that Italy and Japan minimized their role and responsibilities by either blaming Mussolini and fascism in the case of Italy or paying little attention to the atrocities committed against the Chinese in the

case of Japan. In contrast, the United States exaggerated its role as "the natural and pseudo-unilateral defender of the world" (p. 97). Nicholls comments that "perspectives of World War II in United States textbooks appear anchored in the international politics of the present…portrayals of United States forces toppling dictators in World War II bare an uncanny resemblance to recent coverage of the ousting of regimes in Afghanistan and Iraq" (p. 97). Likewise, Julian Dierkes (2010) compares how postwar textbooks in Japan and East and West Germany reconceived national identity following the Second World War. He points out that researchers tend to overlook the central role of the institutional context of policy-making at the level of the nation-state. Dierkes demonstrates that in postwar East Germany, where the curriculum was controlled by party cadres, the war was presented as a result of capitalism. In West Germany, where teachers controlled the curriculum, grand national narratives were abandoned, and historical responsibility was addressed. In Japan, where government bureaucrats were more powerful, curriculum focussed on the who, the what and the where at the expense of consideration of dilemmas around historical responsibility.

Whether a historiographical or contemporary comparative approach is used, these studies highlight that the context of textbook production matters to any analysis. History textbooks are a tool for governments to shape a nation's historical consciousness – how they make sense of and act upon their understanding of the past. Textbooks are part of nation-building whether by means of denial, mythology, or celebration narratives of the past. In the case of Clark's (2007) study, history textbooks offered a white settler narrative framework comfortable to a public that has not yet come to grips with what reconciliation means (p. 111). In the case of Nicholls' (2006) study, history textbooks perpetuated a military industrial complex that has come to define the national identity of the United States. As these examples and others from our dataset show, textbooks are cultural artifacts that reflect "the concerns, the conventional wisdom, and even the fads of the age that produced them," as Frances Fitzgerald (1979, p. 20) so aptly put it. It is critical that such conventions be unraveled by scholars to "demystify and dethrone" (Osborne, 1995, p. 155) the textbook as an objective, closed narrative of the past and instead consider how textbooks may be used as tools to open lines of inquiry about interpretation of the past.

While some scholars have offered an analysis of the political ideologies that challenge the status of textbooks, it is far less common to see an additional examination of how decisions are made regarding textbook content and who makes those decisions. Textbooks are not simply a reflection of the historical and cultural contexts, but rather carefully authored and developed products overseen by for-profit companies to meet the curricular objectives set out by a government.[2] Production (including publishing and authorship) and approval processes should, therefore, be a crucial aspect of any consideration of the socio-political landscape for textbook creation.

Elie Podeh (2000) addresses the role of historians and educators in shaping textbooks, the relationship between the zeitgeist and textbook content, and the impact of historiography on textbooks (p. 69). Podeh analyzes the representation of the Arab-Israeli conflict in history textbooks within the Israeli education system from 1948 to 2000. He found that pre-1967, textbooks were influenced by a nation-building objective that promoted Zionist values and portrayed Arab populations with negative stereotypes (p. 74). Progressively, he argues, textbooks were shaped by the ascension of an intellectual school that sought a more critical approach to history. From 1984 onwards, Podeh writes, "textbooks are fundamentally different from their predecessors…on the whole, these textbooks seem to present a balanced picture of the Arab-Israeli conflict" (p. 85).

Although Podeh's study suggests that intellectual and academic trends can play an important role in textbook development, this is not always the case. Keith Crawford and Stuart J. Foster (2008) address French history textbooks and their representation of the Second World War and the Vichy Regime. They argue that most textbooks before the 1980s "spread false or extremely vague information about Vichy's anti-Jewish policy" (p. 65) and constructed a myth of broad resistance by the French population. They contend that even as French historians began to deconstruct these myths, textbooks maintained that the French were a cohesive people fighting

against tyranny (p. 70). By paying close attention to the historiographical currents in French history, Crawford and Foster clearly demonstrate that the textbooks embellished or misrepresented these events in the past to shape collective memory and identity. While nation-building efforts provide some explanation for misrepresentation, the authors importantly discuss the politics of the textbook industry in France. They attribute mythologies of the Second World War in the texts, in part, to a lack of diversity within multinational publishing companies (p. 66). Even though schools have a choice of textbooks, the textbooks produced are eerily similar in their interpretation of the past and maintain a steadfast commitment to the requirements of French curricula. Rather than textbooks engaging students in historical debates, in this case, industry and government perpetuate a history of "common ideas, shared values, and a cohesive past" (p. 83).

In the Global South, Rafael Capó García (in press), in his analysis of social science and history textbooks, takes into consideration the dominant academic and state sanctioned narratives that have shaped the cultural politics of Puerto Rico. His study shows how most textbooks deploy the discourse of *mestizaje*, or miscegenation and racial mixture, to conceal the violence of colonial conquest. Capó García recounts how this narrative was established as a depoliticized nation-building story to legitimize the country's newly founded Commonwealth status and unify its people. Echoing Crawford and Foster's (2008) findings about the distortion of France's Vichy past, Capó García shows how violence against Indigenous Peoples is mostly portrayed as exceptional acts perpetrated by individuals rather than by a collective evangelizing and civilizing project. The textbooks use the resulting mestizaje as a counter to genocide, emphasizing the bright side of it all.

Many other studies point to this denial of shared culpability as well, a practice that is best understood if contextualized within the country's historiographical currents and cultural political context. Ken Montgomery (2005), for instance, shows how in the interest of Canada's raceless state-sponsored multiculturalism, textbooks presented racism as "isolated occurrences confined to exceptionally flawed individuals or to unusual times" (p. 437). Marta Araújo and Silvia Rodríguez Maeso (2012) make similar arguments about Portuguese textbooks and their assuaging of colonization and slavery with terms such as "'circulation', 'acculturation', and 'miscegenation'" (p. 1279). Jason Nicholls (2006) shows how this is evident in Italian textbooks, where "we find that by placing blame for Italian involvement on the 'fascist degenerate' Mussolini, the Italian people are cleared of responsibility" (p. 98). These tactics of concealing and reframing historical injustices by means of shifting blame to certain communities or individuals highlight the role of official narratives in textbooks and the importance of addressing the political, historical, and cultural context in which they are produced.

Textbook Production: Publishing, Authorship and Approval

A number of scholars have identified publishing as a lacuna when it comes to textbook studies. For purposes of this discussion, we will use the definition of educational publishing provided by Miha Kovač and Mojca Šebat (2019): "any production of print and digital objects that include[s] instructions and recommendations and are used for the transmission of knowledge in primary and secondary education" (p. 276). Christoph Bläsi (2018) notes that there are significant gaps in research on educational publishing and that it is not well represented in book publishing studies. Historian Leslie Howsam (2009) contends that studies in book and publishing history fail to sufficiently acknowledge the role of the publisher and editors, leaving the impression that historians are self-published. Howsam calls for greater scholarly attention to be directed specifically to textbook publishing due to the impact of textbooks on publisher profits, their role in promotion of national pride and the fact that they are the only form of history that most people ever encounter.

Educational publishers play a unique part in both textbook production and provision, but this role can be somewhat hidden from view. In the case of trade books, authors typically submit unsolicited manuscripts to a publisher. In the case of textbooks, on the other hand, publishers solicit authors on the basis of their reputations as teachers or through channels such as teachers'

associations. The publisher guides the authorship process, monitoring to ensure that the textbook is congruent with official curriculum policy documents in order to obtain official approval status. Once complete, the publisher markets the book through whatever channels are available in a particular jurisdiction, which can include grassroots approaches such as sending sales representatives to individual school boards and schools and providing professional development workshops for teachers. All of this demonstrates that the publisher plays a central role when it comes to textbook publishing.

In her comprehensive introduction to the then new publication, *Journal of Educational Media, Memory, and Society*, Simone Lässig (2009) points to a number of contexts in which textbooks function. She identifies the mechanisms of textbook production and approval as a new and promising area of research. She argues that research on textbook publishing should include such topics as the relationship between school textbooks and other educational media, including new media. This research should also examine the "delicate processes of negotiation that differ greatly from one country to the next in terms of their often obstinate participants such as politicians and publicists, parliamentarians and pressure groups, industrial representatives and social activists, textbook authors and textbook publishing houses, parents and peer groups, pupils and teachers" (p. 130). She also suggests that state influence on textbook production, approval, and use, and the economic dimension require examination. We will briefly discuss each of these in turn.

Investigation into the relationship between textbooks and new media is particularly timely and important. Christoph Bläsi (2018) points to a number of new models of textbook production that have emerged as a result of digitization. One example is the advent of open-access textbooks with free creative commons licences that allow teachers to revise content as desired. While digital resources are increasingly impactful, there are many questions related to their use and more research is needed regarding what this change may mean going forward.

Of the participants who are involved in negotiation that Lässig lists, it is perhaps most important to examine the role of the author, even though that role may not be as central as it appears at first glance. Marcus Otto (2018) points out, "the extent of textbook authors' actual influence on the content of 'their' books, the issue of who holds effective responsibility for the knowledge in textbooks—of who authorizes it—is a highly interesting one, which as yet largely awaits systematic academic exploration" (p. 100). Leslie Howsam's publication, *Past into Print: The Publishing of History in Britain, 1850-1950* is somewhat of an exception. A major source for her work on British history textbooks was the extensive correspondence between textbook authors and publishers, Cambridge University Press, Oxford University Press and Macmillan Company, found in the publishers' archives.[3]

The bulk of the evidence to date indicates that the textbook author does not play as key a role as might be reasonably expected. First, the author has little impact on choice of content due to the need to ensure that it is congruent with national or regional curriculum specifications and examination requirements. This is necessary in order for the textbook to receive official approval status in targeted jurisdictions. Without this, the book will fail to achieve sales targets. Second, individual authors can lack autonomy because they often work in "collective forms of authoring," as team members under the supervision of curriculum specialists and editors (Otto, 2018, p. 96). In the case of a history textbook, the team might consist of history teachers (for pedagogical expertise), a historian (for content expertise), curriculum experts, production editors, artwork editors, designers, and illustrators. Third, authors must take the interests of various stakeholders into consideration. In addition to the groups listed by Lässig, these can include teacher unions, religious organizations, and advocates for international causes such as Holocaust education, human rights education, environmental education, and food security, as well as an infinite array of local interests (Fitzgibbons, 1985; Sammler, et al., 2016). Otto (2018) calls for research "which seeks to identify ways in which textbook authors exercise or can exercise agency, how their author function actually plays itself out, and how they simultaneously interact with a range of other actors and networks" (p. 101).

The influence of the state on textbook production and approval is pervasive in most nations. In fact, the key difference between educational publishing and other types of publishing is the central

place of the state. It is the government's curricular guidelines that publishers use to largely determine the development of textbook content. The state also often controls design, production and distribution of textbooks and the state is responsible for textbook approval requirements and procedures. The state typically either provides the funding for textbook purchase or purchases the textbooks and then provides them to schools.

Like publishing and authorship, very little scholarly attention is directed towards state approval processes. An examination of government approval procedures and how they are enacted will reveal the negotiation processes between school content and the various participants. Both Terry Haydn (2011) with reference to the UK and Inari Sakki (2014) to EU countries, have explained that while any private publisher can publish a textbook, typically a few publishers dominate the market. This is, as Sakki points out, because "the structures and contents of the textbooks are based on the guidelines provided by the national curricula. This makes it a big risk for a publisher to publish a book that does not match the core curriculum; hence, history and civics textbooks can be regarded as a technology of the state" (p. 37).

Tony Taylor and Stuart Macintyre (2017) offer three categories of what they call textbook culture in developed nations: These are pluralist, where there are significant numbers of rival publishers (Australia and the United Kingdom), adopted, where there is a limited number of mega-publishers that compete for sole adoption by a major education system (certain individual states in the United States) and endorsed, which rely on state-approved textbooks (Japan, Russia Federation).

Maria Repoussi and Nicole Tutiaux-Guillon (2010) point to five models of approval procedures and two models of textbook distribution:

> one single officially approved textbook; several officially approved textbooks; coexistence of official approved and non-approved textbooks; officially recommended textbooks; and textbooks only produced by private publishers, without official approval. These models combine with two systems of textbook distribution: approved by the state or chosen by teachers, with some influence from the local community. (p. 160)

Given that the authorization of only one single officially approved textbook is often accompanied by government examinations, the above represents a lengthy continuum that ranges from extreme state control to a high degree of teacher autonomy. Although Repoussi and Tutiaux-Guillon (2010) do not make this point, the choice of model is influenced by the political nature of a national government. Democratic nations provide greater choice. Totalitarian nations typically are more authoritarian, often prescribing one authorized government-selected or -developed textbook per grade level, accompanied by government-developed and -administered examinations to ensure instructional adherence to their content.

Very little work has been carried out on the intricacies of the processes by which textbooks receive, or do not receive, official approval. Part of the reason for this is the difficulty of obtaining the documents which provide evidence of the decision-making processes since government bureaucracies are typically highly protective of such information. We will mention two recent exceptions to this. In *Civil Rights, Culture Wars*, author Charles W. Eagles (2017) describes the saga of *Mississippi: Conflict and Change*, a high school history textbook authored by James Loewen (author of *Lies My Teacher Told Me*) and Charles Sallis. This "boldly revisionist" (p. 87) textbook was rejected by the Mississippi State Textbook Purchasing Board. Members of the rating panel wanted students to "take pride in [their] state history, not question it" (p. 184), as this text encouraged them to do. Many of the appraisers, including one Black member, objected to a photograph of a lynching. The authors subsequently challenged the decision in a successful court case. It is solely due to this court case that documents related to the decision to reject the book became part of the public record, thus becoming available to researchers.

No School for Suckers: Textbooks, Political Censorship and Mind Control in a Democracy by Jeremy Richard Tompkins (2014) is a study of the political economy of textbooks in Ontario, Canada from the 1940s through to 1985. This study relies on extensive research in the Archives

of Ontario, where Tompkins was able to access not only textbook evaluations, but other contextual documents including memos and other correspondence, reports, and minutes. The author was able to gain access to these closely guarded documents by means of a Freedom of Information request and by signing a Research Agreement which prohibited photocopying or photographing of the materials. We are not aware of a previous published study using these documents. Like the Charles W. Eagles study, this author closely examined reviewers' comments and recommendations in textbook evaluation documents. He also looked at the extent to which the final decision to approve or reject a book was in agreement with the reviewers' recommendations and considered the question of if not, why not. In particular, he considered the extent to which the final decision was based in political considerations; ultimately discovering that the process was intensely political. In fact, the government was deceptive in the way it went about its business. He states:

> [T]he government obfuscated the rationale for such decisions. In crafting rejection letters to publishers, officers habitually excerpted negative reviews to give the impression that the books were broadly panned even when a majority of reviewers had approved them. Only when a majority of reviewers agreed with rejection did the Ministry reveal the consensus. (p. 23)

According to Tompkins, "The Ministry's lack of transparency resulted in a controlling regime that overstepped its authority, hobbled publishers and students, and kept the population in the dark about its operation" (p. 24).

In "Textbooks in the Balance," Dave Neuman (2019) writes from the perspective of a reviewer in the History-Social Science textbook adoption process in California. Newman describes the vicissitudes of the processes involved. This complex task was complicated further by individual agendas, political protest, and complex requirements at the state level. Much time was consumed by discussion of minutia. He recommends that the required state criteria should be dramatically reduced in order to allow panels to give adequate time to issues that are truly significant. He notes that, after months of work on the part of many people, the State Board of Education overturned his panel's recommendation. This article provides a rare glimpse behind the curtain that is typically drawn around this process. We need more such studies that are written from the perspectives of various insider roles.

Lässig also points to the economic dimension. It is important to examine the economic aspect of publishing since publishing is a business. As such it exists to make a profit and the relationship between the profit motive and the concept of equality of opportunity to access education, which includes the tools of education, such as textbooks, is worth examining. There has been some limited work in this area in Canada. In two reports, industry insiders, Glen Rollans and Michel de la Chenelière (2010) and Rollans and Simon de Jocas (2012), have provided detailed snapshots of the state of Canadian education publishing, with an emphasis on economic aspects. Penney Clark (2017) has traced the development of Canadian educational publisher Copp Clark from its beginnings in 1841 as a retail book and stationery store with printing and lithography services offered on the side to a full-fledged educational publisher, to its purchase by the British firm, Pitman, and finally as part of the multinational, Pearson PLC and its disappearance as an independent educational publishing firm.[4] She demonstrates how this was a typical path for a Canadian educational publisher. Clark and Wayne Knights (2011; 2013) have portrayed Canadian educational publishing as an enterprise located at the intersection of economics, politics and nationalistic expectations related to ownership, authorship and content. Clark (2017) has also examined regional educational publishing in Canada, identifying it as "a business activity surrounded by a cultural environment," as publisher Robin Farr called it in 1973. Her conclusion was that educational publishing in Canada is not sustainable at the level of region. These studies point out to an implicit tension between the view of Canadian publishing as a cultural activity versus as an industry.

Educational publishing, once "the brightest and most popular star on the publishing horizon," (McClelland, 1956, 32) has become a precarious proposition. Of the five largest educational book

publishers (K-12 and higher education), Prentice-Hall Pearson, McGraw-Hill, John Wiley, Cengage, and Houghton Mifflin, three have recently either filed for creditor protection or been taken private (Wischenbart, 2017).

Conclusion

As this article demonstrates, research on history textbooks is a burgeoning field that emphasizes the position of textbooks as "primary sources of knowledge and understanding" and their highly politicized capacity to influence how students perceive the world around them (Roberts 2014, p. 52). It is well acknowledged that the textbook represents a fruitful area for analysis that offers a multiplicity of insights regarding what is valued by the educational system in which they receive official approval (Klymenko, 2016; Podeh, 2000).

Context matters when it comes to analyzing textbooks because they are important communication devices that are widely used in environments where they have a captive audience. History textbooks are particularly important because they perpetuate national narratives as Grever & van der Vlies (2017) and many others point out. Overwhelmingly, the field of history textbook research still lacks attention to the positionality and perpetuation of historical knowledge(s) as shaped by the context in which the textbook is created and disseminated. Greater research attention needs to be directed not only at disentangling the logics of textbook content, which dominates the field, but also at the social and political contexts of their development, including their production (publishing and authorship) and the processes by which they receive official approval. Such attention is needed to further challenge the politicized nature of history textbook development, curation and approval that, albeit highly impactful, is disproportionately under-analyzed in the field of study.

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Acknowledgements

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Author Contributions

This paper was very much a collaborative effort. As lead author, Penney Clark developed the framework for analysis of the textbook studies and supervised the analysis process. She and Kristina Llewellyn, in concert with graduate students Rafael Capó Garcia and Sarah Clifford, conceptualized the paper. Clark wrote the section on textbook production and all authors contributed to other parts of the paper.

Endnotes

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[1] To demonstrate the range of articles consulted, our corpus features work from the following 27 journals: *Alter Native, An International Journal of Indigenous Peoples; BC Studies; Citizens Education Research Journal; Comunicación y Sociedad; Curriculum Inquiry; Discourse: Studies in the Cultural Politics of Education; Education, Citizenship and Social Justice; Education Inquiry; Educational Studies; History and Memory; ENSAYOS. Revista de la Facultad de Educación de Albacete; Ethnic and Racial Studies; History of Education; Historical Studies in Education; History of Education Review; International Journal of Historical Learning, Teaching and Research; International Journal of Intercultural Relations; International Journal of Science Education; Journal of Curriculum Studies; Journal of Educational Media, Memory and Society; Journal of International Cooperation in Education; Journal of Social and Political Psychology; McGill Journal of Education; Paedagogica Historica; Social Studies Research and Practice; South African Journal of Education; and Teachers College Record.*

Our selection of edited volumes consists of 12 works, which are: *Analyzing Textbooks: Methodological Issues* (2011); *Censoring History: Citizenship and Memory in Japan, Germany, and the United States* (2000); *History Wars and the Classroom: Global Perspectives* (2012); *The Palgrave Handbook of Research in Historical Culture and Education* (2019); *The Palgrave Handbook of Textbook Studies* (2018); *(Re)Constructing Memory: School Textbooks and the Imagination of the Nation* (2014); *The Politics of the Textbook* (1991); *Reconciling Ancient and Indigenous Belief Systems: Textbooks and Curriculum in Contention (in press); School History Textbooks Across Cultures: International Debates and Perspectives* (2006); *Teaching the Violent Past: History Education and Reconciliation* (2007); *War, Nation, Memory: International Perspectives on World War II in School History Textbooks* (2008); *and What Shall We Tell the Children? International Perspectives on School History Textbooks* (2006).

[2] We note that there are instances where the government itself is the publisher of textbooks. In Canada, this is most likely to be encountered in the three northern territories, which publish some of their own resources.

[3] One interesting finding is the attitude of male historian authors towards female authors. Howsam mentions male historians who referred to "highly teachable" women who produced "baby histories" for the popular market or for schoolchildren. The attitudes of these male historians to women's authorship "ranged from patronizing to dismissive" (Clark, 2010, p. 224).

[4] Its name remains as a publisher of financial trading and settlement calendars.