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## DOING THE WORK: USING QUESTIONS, TASKS, AND SOURCES TO NAVIGATE TEACHING CONTENTIOUS SOCIAL STUDIES IN SECONDARY CLASSROOMS

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DOING THE WORK: USING QUESTIONS, TASKS, AND SOURCES TO  
NAVIGATE TEACHING CONTENTIOUS SOCIAL STUDIES IN SECONDARY  
CLASSROOMS

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DISSERTATION

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A dissertation submitted in partial fulfillment of the  
requirements for the degree of Doctor of Philosophy in the  
College of Education  
at the University of Kentucky

By

Bonnie Patrice Lewis

Lexington, Kentucky

Co-Directors: Dr. Kathy Swan, Professor of Curriculum and Instruction  
and Dr. Ryan Crowley, Associate Professor of Curriculum and Instruction

Lexington, Kentucky

2023

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## ABSTRACT OF DISSERTATION

### DOING THE WORK: USING QUESTIONS, TASKS, AND SOURCES TO NAVIGATE TEACHING CONTENTIOUS SOCIAL STUDIES IN SECONDARY CLASSROOMS

This explanatory case study examines how two secondary social studies teachers use inquiry-based learning to mitigate the risks of teaching contentious social studies in a charged classroom. Research questions included: 1. How do two in-service secondary teachers use inquiry-based instruction to navigate teaching contentious social studies during charged times? 2. What curricular and pedagogical choices were made by the in-service teachers to navigate risk when *designing* inquiry-based instruction that features contentious social studies during charged times? 3. What curricular and pedagogical choices were made by the in-service teachers to navigate risk when *delivering* inquiry-based instruction that features contentious social studies during charged times? Through interviews, observations, and artifacts, this study examined the teachers' instructional choices as they taught units featuring American Reconstruction and Europe's interwar years and the rise of Hitler. Data was analyzed using Swan et al.'s (2018) *Questions, Tasks, and Sources [QTS] Observation Protocol* and Pace's (2021) *Framework for Teaching Controversial Issues*. The author identified three broad themes: *curriculum control*, *ideological distancing*, and *community utilization*. The teachers exerted significant control over their instruction, privileging safety over openness in how they designed and delivered their lessons. Additionally, when instructing on topics in which they held different views than the school's community, they distanced themselves from the contentious issues they taught. Finally, the teachers' engagement with the community and strong positive regard for their students facilitated greater and more effective risk-taking in their teaching practice. This work speaks to the impact of official curricula on teachers' praxis when teachers and communities hold different views of topics as open or closed to deliberation.

**KEYWORDS:** *social studies, curriculum and instruction, inquiry, C3 Framework*

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Date

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## DEDICATION

For my parents, who raised a lover and fighter. Thank you.

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## Chapter 1

### Introduction to the Study

*“There is a lot of good in our nation’s history, but there are also the ugly facts of slavery, white supremacy, worker exploitation, homophobia, sexism, and more... Honest patriotism would seek a shared and truthful understanding of our past so we could all continue striving to create a more perfect union.” Matt Crankshaw, ACLU of Kentucky, Statement Regarding New Classroom Censorship Law, Senate Bill 1, 2022*

### Introduction

Social studies curriculum in the United States has garnered national attention in the last three years. The chaos of the pandemic and calls for a reckoning with America’s racist past and present have further ignited the national debate on the nature and purposes of social studies. With the COVID-19 pandemic disrupting social and economic structures, the killing of Brianna Taylor and George Floyd sparking global protests against racism, and the 2020 election exposing cracks in America’s political and social institutions, the climate in which teachers teach has rapidly changed. Additionally, within Kentucky, new social studies standards drawing from the *College, Career, and Civic (C3) Life Framework*—the nationally adopted social studies standards framework—were passed in 2019, which centered on inquiry and civic action (National Council for the Social Studies (NCSS), 2013; Kentucky Department of Education (KDE), 2019) by asking teachers to ground their curriculum in deliberation and argumentation. Within the C3 Framework, social studies education aims to allow students to explore civic and justice-oriented ideas through deliberative questions (e.g., Am I going to vote? Is greed good? Can peace lead to war? What does it mean to be equal?). However, in response to



national calls to center inquiry and equity-based social studies curriculum, parents and policymakers have pushed back against what should be taught in the social studies classroom, particularly about the legacy of slavery and the use of Critical Race Theory as a frame for understanding race and inequity in the U.S. today. The state of social studies, nationally and locally, is tenuous as the field finds itself at a crossroads. To date, 42 states have taken legislative measures to limit what can be taught in social studies classrooms under the guise of removing Critical Race Theory from the curriculum, and 18 states have signed such measures into law (Schwartz, 2023).

In the debate over how social studies should be taught, one side argues for social studies education to be based on inquiry, citing the C3 Framework (NCSS, 2013) and equity, citing scholarship calling for social studies curriculum that challenges master narratives, emphasizes multiple perspectives, and critiques systems of power (Bolgatz & Crowley, 2015; Hawkman, 2020; King, 2019; Sabzalian et al., 2021, Crowley & King, 2018). The C3 Framework frames the purpose of social studies education around creating informed citizens willing and able to participate in a pluralistic democracy (NCSS, 2013). This purpose is best exemplified in the Inquiry Arc’s four dimensions: “developing questions and planning inquiries; applying disciplinary concepts and tools; evaluating sources and using evidence; and communicating conclusions and taking action” (NCSS, 2013, p. 17). The Inquiry Arc—as applied to curriculum design through the Inquiry Design Model’s [IDM] questions, tasks, and sources (Swan et al., 2018, 2020)—tasks teachers with framing social studies as something students *do* rather than passively learn. Students investigate deliberative questions using disciplinary skills and sources to communicate their informed conclusion in response to the compelling question. Teachers

facilitate student inquiry rather than deliver a chronological list of historical names and events. The C3 Framework was adopted as a national curriculum document by NCSS in 2013. Since its national adoption, the C3 Framework has been adopted, influenced, or cited in 33 state social studies standard documents, including Kentucky (New, et al., 2021).

In addition to scholarship around inquiry-based instruction, scholars write about the importance of equity-based curriculum in social studies. Equity-based curriculum frames the purpose of social studies around fighting oppression and working toward justice. While not the same, the purposes of inquiry and equity-based social studies complement one another in that both focus on student agency in working towards a more democratic and just world. The term equity-based curriculum encompasses key ideas in prominent scholarship around curriculum that contributes to justice by honestly examining how past events and legislation created long-term systemic inequities. Specifically, equity-based social studies shows up in social studies curriculum by emphasizing diverse perspectives (Paris, 2012; Ladson-Billings, 1995) and challenging hegemonic structures (Demoigny, 2018; Naseem Rodriguez & Swalwell, 2022; Ladson-Billings, 2003; Crowley & King, 2018). Such theoretical approaches to social studies curriculum focus on the criticism of official content artifacts via critiques of master narratives told in textbooks (Alridge, 2006; Brown & Brown, 2010; Diaz & Deroo, 2020; Loewan, 2018; Padget, 2015, van Kessel & Crowley, 2017) and standards (An, 2016; Anderson & Metzger, 2011; Busey & Walker, 2017; Sabzalian et al., 2021; Shear et al., 2015) in addition to curriculum frameworks which call for teachers to frame content through a justice-oriented and antiracist lens (Demoigny, 2018, Wills, 2018) and to center

histories of marginalized groups (Eraqi, 2015; Hawkins, 2012). Critical Theory underpins much of this research in the form of Critical Race Theory, Critical Feminist Theory, and Tribal Critical Race Theory. Each examines power relationships and hegemonic structures and their role in propagating injustice while challenging how progress narratives present in master narratives. By approaching history from a critical standpoint, scholars argue that social studies can be used to foster justice in our society. Like the C3 Framework, equity-based approaches to social studies education ask students to be a part of imagining and creating a more democratic and just society.

Countering those who center inquiry and equity-based social studies are parents and politicians who wish to center nationalistic narratives in the social studies classroom. Beginning in 2021, 42 states introduced and 18 passed laws regulating social studies instruction modeled after the Trump administration's *1776 Report*. Social studies curriculum and instruction have always been susceptible to cultural influence because the purpose of social studies is tied to civic participation (Barton & Levstik, 2004). Such ties can complicate the cultural response to curriculum and instructional choices as people see social studies as linked to nationalistic identities. The *1776 Report*, drafted in response to work like Hannah-Jones's *1619 Project* (2019) and the calls for a reckoning with America's structural racism in the wake of the 2020 Black Lives Matter protests, is a prime example of how social studies curriculum and instruction can be used as a tool to build nationalism. Although the report had no real power over social studies curriculum and instruction, it inspired the creation of state-level bills that sought to limit and control the historical narratives featured in social studies classes. What started as informal public

critique and pushback to equity-based social studies has now worked its way into legislation.

Kentucky is among the states that have proposed legislation limiting instruction that is concerned with race, racism, sexuality, gender, or anything else deemed divisive. Although the passed legislation ultimately excluded explicit bans on divisive topics, opting instead to legislate a list of primary source documents deemed foundational to American history, the sentiment of distrust in social studies curriculum and instruction was sown. Politicians, parents, and legislators are emboldened to speak out against social studies instruction that features multiple perspectives and calls out inequities in the past and present. Social studies in the state of Kentucky is in a tenuous state, and the classroom is a charged place as teachers must teach social studies in compliance with state standards and scholarship that lifts up inquiry and equity as politicians and communities push back. Left at the center of these discussions about the purpose of social studies are social studies teachers tasked with the risky job of navigating conflicting ideologies within their classrooms.

The fight over the purpose of social studies has turned the spotlight on social studies teachers and has created a risky environment for teachers to teach civically grounded and justice-oriented social studies. In such an environment, how do teachers hold true to the roots of social studies while navigating national, state, and local level pressures and avoid the controversy that comes with inquiry-based teaching? As legislation like Kentucky's Senate Bill 1 is passed to control how social studies teachers teach about the past and present and national conversations call into question teacher autonomy and the purpose of social studies, it is important to understand how such

charged environments impact teacher practice. Specifically, it is important to know how teachers design and deliver inquiry and equity-based social studies curriculum while facing legal restrictions which limit their instructional autonomy and impact the classroom climate. Understanding how teachers navigate this instructional environment—one in which the state standards and community wishes might be opposed—contributes to the field of social studies teacher education by exploring how the theory of inquiry as operationalized in the IDM possibly aids teachers in containing the risk of teaching social studies during charged times (Swan et al., 2014).

### **Purpose of the Study**

This qualitative case study aims to understand how two teachers in charged classrooms navigate the conflicting purposes of social studies through the choices they make around designing and delivering inquiry-based instruction that features contentious social studies. I explored this by conducting a case study analysis of two social studies teachers in a Kentucky high school as they diagnose, design, deliver and debrief an inquiry-based unit around a contentious issue. The central assumption of the study is that the theory of inquiry and the IDM promotes democratic and justice-oriented social studies (Swan et al., 2014). Two other assumptions in this study are that teachers make choices when designing and delivering curriculum to minimize student and community pushback to contentious issues (Pace, 2021; Hess, 2009) and that Kentucky social studies classrooms are charged spaces (Pace, 2015 & Hess & McAvoy, 2015). By conducting a holistic case study of two teachers at a Kentucky high school, this study provides perspective on how social studies teachers navigate the current political climate regarding social studies curriculum and instruction.

## Research Questions

The main research question for this study is: How do two in-service secondary teachers use inquiry-based instruction to navigate teaching contentious social studies during charged times? Supporting questions include:

1. What curricular and pedagogical choices were made by the in-service teachers to navigate risk when *designing* inquiry-based instruction that features contentious social studies during charged times?
2. What curricular and pedagogical choices were made by the in-service teachers to navigate risk when *delivering* inquiry-based instruction that features contentious social studies during charged times?

## Significance of the Study

If we have learned anything in recent years, it is that social studies is important to the process of creating a just and democratic society (NCSS, 2013; Barton & Levstik, 2004). Additionally, contextual factors like regionality and political polarization make teaching social studies more difficult (Boxell et al., 2020; Schwartz, 2023). There is a body of literature examining how teachers navigate teaching controversial issues in contentious spaces that speaks broadly to the phenomenon (Hess, 2009; Camicia, 2008), in addition to region-specific research focusing on how a place impacts the charged nature of a classroom (Pace, 2021; Goldberg, 2017; Hess & McAvoy, 2015; Barton & McCully, 2007; Kitson & McCully, 2005). Since the publication of the *1619 Project* (Hannah-Jones, 2019), social studies education has entered a new era of contention over whose history should be taught as states pass anti-critical race theory legislation (Schwartz, 2023) inspired by the Trump administration's *1776 Report* released in January

of 2021. The current research generally speaks to the pressures social studies teachers face in states where such legislation has been passed. Still, it does not address the unique ways social studies teachers navigate the charged nature of their classrooms. Even more, there is no research into how the theory of inquiry can help teachers navigate teaching democratic and justice-oriented social studies in spaces that pressure them to present more sanitized narratives that purport nationalistic views of the United States.

## **Chapter 2**

### **Literature Review**

Teaching controversial issues and hard histories is a part of teaching social studies (Hess, 2009; Southern Poverty Law Center [SPLC], 2018). Additionally, social studies curriculum and instruction have expanded in the last decade to center inquiry and equity-based pedagogies and critically grounded curricula (National Council for the Social Studies [NCSS], 2013; Crowley & King, 2018). The emphasis on inquiry and equity-based curriculum and instruction has made controversial issues and hard histories central to research-based social studies praxis and has centered argumentation and deliberation as the foundation of the social studies classroom (NCSS, 2013; New et al., 2021). However, centering controversial issues and hard histories in the social studies classroom is difficult and requires pedagogical expertise (Beck, 2019; Geller, 2020; Pace, 2021). Moreover, doing so during charged times makes such endeavors even more difficult and complicated (Hess & McAvoy, 2015; Pace, 2015).

In this chapter, I will discuss the role of inquiry and equity in social studies and how each is operationalized in curriculum and instruction. Next, I will examine past and present pushback to inquiry and equity-based social studies curriculum and instruction, noting how current pushback presents unique challenges to the field. Then, I will clarify important terms around deliberative social studies before reviewing how scholars propose social studies curriculum and instruction should address deliberation in charged times. Finally, I will examine teacher approaches to the deliberation of contentious issues and set up my theoretical framework.



## **Inquiry and Equity in the Social Studies**

Theoretical approaches to social studies that center on democratic citizenship and equity based-pedagogies are operationalized in inquiry-based instruction and critical approaches to social studies curriculum. In 2019, after years of deliberation, Kentucky adopted new social studies standards (KDE, 2019). These standards are based on the C3 Framework (NCSS, 2013) and highlight the Inquiry Arc, which is grounded in argumentation and civic-mindedness (New et al., 2021). That same year, the New York Times magazine published the *1619 Project* (Hannah-Jones, 2019), which centers on the institution of slavery and racist ideologies as foundational to American history. The *1619 Project* and other equity-focused curricula (e.g., Learning for Justice, Black Lives Matter at Schools) compliments the C3 Framework’s emphasis on challenging master narratives, including voices of the oppressed, and moving towards action (Crowley & King, 2018).

In this section, I will first discuss the creation of the C3 Framework and the IDM. Then, I will discuss the adoption of the C3 Framework and inquiry cycle within Kentucky’s Academic Standards for Social Studies [KASSS]. Finally, I will discuss the national push to center equity-based social studies curricula through critical content analyses of textbooks and standards before discussing curricula that feature critical approaches to social studies content.

### **Inquiry-based Social Studies**

Inquiry-based education is not new (Dewey, 1923), but it has evolved into a more concrete pedagogical approach in the last century adopted by social studies (Barr et al., 1977; Beyer, 1971; Levstik & Barton, 2015). Levstik and Barton (2015) define inquiry as “the process of asking meaningful questions, finding information, drawing conclusions,

and reflecting on possible solutions” (p. 13). In the last 25 years, inquiry-based pedagogy has been refined in its application to social studies. It has been clarified in the C3 Framework and its Inquiry Arc (NCSS, 2013) in addition to the IDM (Swan et al., 2018). In this section, I will first talk about the theory of inquiry within the C3 Framework and IDM. Then I will discuss the C3 Frameworks’ adoption as a national social studies document and its influence on state social studies standards.

### ***The College, Career, and Civic Life (C3) Framework***

The C3 Framework’s creation, adoption, and implementation represent a shift in social studies curriculum and instruction. First, by creating a national curriculum document, the framework sought to solidify social studies’ standing as a discipline from threats of absorption into English Language Arts (Swan & Griffin, 2013). Second, it upholds the importance of content and skill-based pedagogical practice. Finally, the C3 Framework is a foundation for cohesive, state-by-state implementation of social studies curriculum and instruction grounded in argumentation.

The C3 Framework was developed in response to threats to eliminate the social studies discipline in the aftermath of educational policy and national curriculum documents for English Language Arts (ELA) and Mathematics in the wake of the *No Child Left Behind Act* (2002). The framework writers utilized ELA Common Core language around argumentation to connect social studies to ELA skills around argumentation. This connection requires social studies to share the responsibility for teaching these skills to students. Additionally, the C3 Framework sought to transcend interdisciplinary conflict over the importance of content and skills in social studies curriculum and instruction by centering both. However, and most importantly, the C3

Framework frames the purpose of social studies education as creating informed citizens willing and able to participate in a pluralistic democracy (NCSS, 2013).

In the introduction to the C3 Framework, the writers define the purpose of social studies through a civic engagement lens and state that,

Engagement in civic life requires knowledge and experience; children learn to be citizens by working individually and together as citizens. Therefore, an essential element of social studies education is experiential—practicing the arts and habits of civic life (NCSS, 2013, p. 6).

This approach is further clarified as the writers explain the dimensions of the Inquiry Arc (Table 1), most notably in the fourth dimension, Communicating Conclusions and Taking Informed Action.

Dimension 1: Developing Questions and Planning Inquiries	Dimension 2: Applying Disciplinary Tools and Concepts	Dimension 3: Evaluating Sources and Using Evidence	Dimension 4: Communicating Conclusions and Taking Informed Action
Developing Questions and Planning Inquiries	Civics	Gathering and Evaluating Sources	Communicating and Critiquing Conclusions
	Economics		
	Geography	Developing Claims and Using Evidence	Taking Informed Action
	History		

Table 1 | The Inquiry Arc, NCSS, 2013

Here, they write that the Inquiry Arc should culminate in creating students who display the following characteristics:

Active and responsible citizens identify and analyze public problems; deliberate with others about how to define and address issues; take constructive,

collaborative action; reflect on their actions; and influence large and small institutions. They vote, serve on juries, follow the news and current events, and participate in voluntary groups and efforts. (NCSS, 2013, p. 19)

The writers of the framework articulate that democracy is a *practice* and that the skills for participation must be taught, practiced, and acted upon. Centering “citizenship that is participatory, pluralist, and deliberative” (Barton & Levstik, 2004, p. 28) is both an imperative and a calling. First, it provides a paradigm by which to frame the implementation of social studies. Content and skills not in line with this directive need not take up educational time and effort in a system with many limitations on teachers’ time and energy. However, most importantly, it establishes social studies as a discipline *worth* engaging in.

### ***The Inquiry Design Model [IDM]***

The IDM takes the theory of inquiry presented in the C3 Framework and operationalizes it for implementation in the social studies classroom. The model distills the four dimensions found in the C3 Framework into three components of inquiry-based curricular design: questions, tasks, and sources (Swan et al., 2018). Swan et al.’s emphasis on questions in the model focuses curricular design around compelling questions grounded in argumentation. Compelling questions are carefully framed around deliberative issues that require a response in the form of an argument. Argumentation, in response to the compelling question, is aided by supporting questions that allow students to explore how they might deliberate and argue their responses. To answer these questions, students use disciplinary sources to gather evidence to support their arguments. As part of students’ analysis of sources, they engage in tasks rooted in disciplinary skills.

Ultimately, after engaging in this sequence and deliberating their response to the compelling question, students construct an argument that addresses the issue framed in the compelling question.

### ***Kentucky Academic Standards for Social Studies***

The C3 Framework was developed to be a framework, not a standards document, to foster national cohesiveness in social studies education while still allowing space for local implementation. With that goal in mind, the writers were careful to write the framework in a way that upheld the tenets of rigorous inquiry-based social studies while guarding against “corrosive political controversy” (Swan & Griffin, 2013, p. 318). What followed was a document published by the National Council for the Social Studies on Constitution Day in 2013. As of 2021, the C3 Framework has been adopted, influenced, or cited in 33 state social studies standard documents (New et al., 2021). Of interest to this study is the C3 Framework’s adoption in the KASSS.

Kentucky adopted the KASSS in 2019 and began implementation that August. The standards align with the C3 Framework and feature the Inquiry Arc as an Inquiry Cycle (KDE, 2019). The Kentucky standards emphasize that “...social studies classrooms are the ideal locations to foster civic virtue, apply inquiry practices, consider current issues, engage in civil discourse, and build a civic identity and an awareness of international issues” (p. 5). Additionally, like the C3 Framework, the KASSS aims to produce high school graduates that are “civically engaged, socially responsible and culturally aware... through the disciplines of civics, economics, geography and history and the inquiry practices of questioning, investigating, using evidence and communicating conclusions” (p. 5). To that end, like the C3 Framework, the Kentucky

standards ground social studies in argumentative questions that encourage students to think critically about the world and their community and foster civic engagement. The standards are not written to mandate historical facts to be taught in the classroom. Instead, per Kentucky law (Kentucky Revised Statutes [KRS] 160.345, 1990/2021), that power is left to school districts' school boards to decide. The Kentucky Department of Education expects teachers to structure their courses around the Inquiry Cycle.

### **Equity-based Social Studies**

In addition to calls to center inquiry-based instruction, scholars emphasize the importance of an equity-based curriculum in social studies. Equity-based curriculum frames the purpose of social studies around fighting oppression and working toward justice. Although not inherently the same, inquiry and equity-based social studies complement one another because both focus on student agency in working towards a more democratic and just world. The term equity-based curriculum encompasses key ideas in prominent scholarship around curriculum that contributes to justice by honestly examining the past. Specifically, the notion of emphasizing diverse perspectives from culturally sustaining pedagogy (Paris, 2012; Ladson-Billings, 1995) and the challenging of hegemonic structures in social justice, anti-racist or anti-oppressive pedagogical frameworks (Demoigny, 2018; Naseem Rodriguez & Swalwell, 2022), and critical frameworks (Ladson-Billings, 2003; Crowley & King, 2018). Such theoretical approaches to social studies curriculum focus on the criticism of official content artifacts via critiques of master narratives told in textbooks (Alridge, 2006; Brown & Brown, 2010; Diaz & Deroo, 2020; Loewan, 2018; Padget, 2015; van Kessel & Crowley, 2017) and standards (An, 2016; Anderson & Metzger, 2011; Busey & Walker, 2017; Sabzalian

et al., 2021; Shear et al., 2015) in addition to curriculum frameworks which call for teachers to frame content through a justice-oriented and antiracist lens (Demoigny, 2018, Wills, 2018) and to center histories of marginalized groups (Eraqi, 2015; Hawkins, 2012). Critical Theory underpins much of this research in the form of Critical Race Theory, Critical Feminist Theory, and Tribal Critical Race Theory. Each examines power relationships and hegemonic structures and their role in propagating injustice while challenging progress narratives present in master narratives. By approaching history from a critical standpoint, scholars argue that social studies can be a tool for justice in our society. Like the C3 Framework, equity-based approaches to social studies education ask students to be a part of imagining and creating a more democratic and just society.

### ***Critically Focused Curriculum***

In the same way that the IDM operationalized the theory of inquiry with the C3 Framework, the field is also working to operationalize curricula grounded in equity-based pedagogies. The most famous example in recent years is the *1619 Project*. A special edition of the *New York Times Magazine*, the *1619 Project* is a journalistic effort grounded in the central tenets of Critical Race Theory. The project argues that, while race is a social construct, racism is real and a common experience for Black, Indigenous, and People of Color. Specifically, the project situates itself in American history. It posits that Americans cannot talk about American history *without* talking about the enslavement of Africans and that racism is at the foundational core of American democracy. The project was not a piece of scholarly research nor a social studies curriculum. However, its emphasis on United States History and the encouragement of its use in the classroom placed it in the secondary education arena. Today, the project's influence has grown to

feature an Education Materials Collection (Pulitzer Center, 2022). Curricular resources are available for all grade levels and feature lessons around inequality and racism.

The *1619 Project* was not the first to center critical approaches to United States History content. Learning for Justice (formally Teaching Tolerance), a project out of the Southern Poverty Law Center, was launched in 1991 and features curriculum and instructional strategies that are “a catalyst for racial justice in the South and beyond, working in partnership with communities to dismantle white supremacy, strengthen intersectional movements and advance the human rights of all people” (SPLC, 2021). Lessons center on critical issues around historical and current injustices and encourage students to face America’s hard histories (SPLC, 2018). In addition to lesson materials, the SPLC is known for its *Teaching Hard Histories* report (SPLC, 2018). This report makes the same claim as the *1619 Project* and states that “slavery is not an aberration in American history; it is at the heart of our history, a main event, a central foundational story” (p. 7). The SPLC’s work and their alignment with the arguments found in the *1619 Project* and critical theory demonstrate that the *1619 Project* is not a departure from social studies trends, but a continuation. Therefore, equity-based social studies, like inquiry-based social studies, is not new nor inconsequential, but is an approach that has gained strength over the years and is supported in numerous educational organizations and institutions.

### **Pushback to Inquiry and Equity-based Social Studies**

Social studies pedagogical and curricular research and practice, past and present, advocate for inquiry and equity-based pedagogies. Additionally, the adoption of national and state curriculum frameworks and standards based on inquiry suggests support for this



pedagogical approach to social studies. However, pushback by conservative, right-wing politicians and thought leaders makes the implementation of such efforts complicated. This pushback is not new, but the current iteration presents unique challenges to social studies classroom teachers.

In this section, I will first review the pre-2019 pushback to non-normative social studies curriculum and instruction. Then, I will discuss post-2019 pushback in the form of symbolic and formal opposition to inquiry and equity-based social studies curriculum and instruction. I will then briefly compare the past and present efforts to limit inquiry and equity-based social studies to demonstrate that, while the current pushback represents a perennial issue in the field, current efforts are unique and pose new challenges for social studies teachers to address.

### **Pre-2019 Pushback**

Social studies curriculum and instruction have always been susceptible to cultural influence. Unlike other disciplines, the purpose of social studies is tied to civic participation (Barton & Levstik, 2004). Although this purpose safeguards social studies from absorption into other disciplines like English Language Arts, it also ties social studies curriculum to ideas of national identity, which can complicate the cultural response to curriculum and instructional choices. Before the controversies surrounding the *1619 Project* and other critically based curricula began, similar disputes arose around creating national history standards during the 1990s. We can look at these examples to see how they are alike and different from current reactions to inquiry and equity-based social studies to establish the unique challenges facing current teachers.

### ***The History Wars of the 1990s***

During the 1990s, the National Center for History in the Schools at the University of California, Los Angeles, set out to create a history standards document. This document was designed for voluntary adoption by state education departments and was made at the request of state and national governments (Nash, 1997). The effort failed and instigated widespread controversy, with discussion focusing on the purpose of social studies in the classroom. Part of what made the creation of a national standards document so difficult is that social studies curriculum represents the larger American identity through the metanarratives told in historical accounts (Avila, 2016). “Challeng[es to] the order and stability” (Engelhardt, 1996 as quoted in Avila, 2016, pg. 360) of American history master narratives call into question the ideals and values on which many Americans base their national identity. Therefore, there can be significant pushback when standards or curricula seek to complicate that accepted narrative.

The History Wars of the 1990s represent conflict over which narrative best matches our nation’s identity. The history captured in the *National History Standards* represented a narrative at odds with a national identity grounded in nationalistic progress narratives in that the standards sought to include critical perspectives on American history that were more expansive and in line with modern scholarship but were critiqued for emphasizing “political correctness and multiculturalism” (Nash, 1997, p. 16). Critics zeroed in on what was left out and posited that the deemphasis of this content indicated an effort to undermine American identity and democracy. In 1996, *Social Education* included three articles discussing the controversy around the *National History Standards*. In one article critiquing the standards, Warren Saxe (1995) finds fault with the additive nature of underrepresented historical figures and expresses concern about removing

significant historical figures. He argues that eliminating significant historical figures from the standards and adding in less important ones takes attention away from the more important events in American History (Warren Saxe, 1995). He asks, “Why are there seventeen references to the Ku Klux Klan and not a single specific standard for the U.S. Constitution? Why nineteen references to McCarthy and McCarthyism and not a single required reading of the Federalist Papers—which are arguably among the most significant works of democracy ever written?” (Warren Saxe, 1995, p. 45). His critique of the standards is grounded in the metanarrative he argues should be taught in American social studies courses. In response to the criticism and pushback, the *National History Standards* were abandoned. For the next decade, the social studies discipline turned its attention to emphasizing critical thinking skills and inquiry-based pedagogies.

### **The 1776 Report**

In line with the historical pattern of efforts to reform social studies followed by periods of ideological pushback, current efforts to center marginalized voices, question power structures, and promote civic agency have been met with political pushback. Although discontent and pushback started immediately in response to the *1619 Project* (Charles, 2019), the *1776 Report* officialized critiques. Released by the Trump administration in January of 2021, the report followed the creation of the 1776 Commission in September 2020, an act in direct response to the *1619 Project* and the Black Lives Matter protests during the late spring and summer of 2020 (Gaudiano, 2020). The *1776 Report* represents the administration’s official response to cultural shifts around American historiographical interpretations of the past and argues that, while individual actors have made mistakes throughout American history, “these wrongs have always met

resistance from the clear principles of the nation, and therefore our history is far more one of self-sacrifice, courage, and nobility” (1776 Report, 2021, p. 1). The report argues for American History curriculum to tell a progress narrative. It frames any events that stray from American principles (notably those found in the U.S. Constitution and other founding documents) as aberrations. The report's survey of American history makes a significant effort to argue that America’s story is one of progress. Its headers titled “The Meaning of the Declaration” (p. 2), “A Constitution of Principles” (p. 6), “Challenges to America’s Principles” (p. 10) (challenges listed include slavery, progressivism, fascism, communism, and racism and identity politics), and “The Task of National Renewal” (p. 16) paint a portrait of past mistakes and nationalistic nostalgia. The document contains a series of appendices ranging from the Declaration of Independence text to essays about identity politics and education. Appendix IV, Teaching Americans about their Country, is particularly interesting to my inquiry. This essay contains lifted sections from 1776 Commission member Thomas Lindsay’s 2008 opinion piece for Inside Higher Ed. Lindsay recommends a larger emphasis on civics and government courses and calls for them to be based on unedited primary sources with prescribed the perspectives for engagement.

The 1776 Commission published this report in the waning days of the Trump presidency, making it a symbol, not a decree, of conservative thought about historical metanarratives and history education. However, while the report carried no power over the implementation of social studies curriculum and instruction (that power, while open to influence by national mandates, is largely reserved for state governments), state bills

touting similar themes to those in the *1776 Report* have emerged and represent a real threat to social studies education.

### **Anti-Critical Race Theory Bills at the National Level**

Education Week stated that “since January 2021, 42 states have introduced bills or taken other steps that would restrict teaching critical race theory or limit how teachers can discuss racism and sexism” (Schwartz, 2023). What started as informal public critique, pushback to critical social studies has now worked its way into legislation. In this process, Critical Race Theory has come to mean any topic which concerns race, racism, sexuality, gender, or anything else deemed divisive. Much of the wording in these proposed and passed bills expand on concepts in the *1776 Report* and include language like what is found in Mississippi’s Senate Bill 2113, passed March 14, 2022,

No public institution of higher learning, community/junior college, school district or charter school shall direct or compel students to affirm that any sex, race, ethnicity, religion, or national origin is inherently superior, or that individuals should be adversely treated based on such characteristics; to provide that no distinction or classification of students shall be made on of race other than the required collection or reporting of demographic information; to provide that no course of instruction shall be taught that affirms such principles... (An Act to Prohibit Critical Race Theory, 2022).

According to Education Week (2023), as of March 2023, eighteen states (Alabama, Arkansas, Florida, Georgia, Idaho, Iowa, Kentucky, Mississippi, Montana, New Hampshire, North Dakota, Oklahoma, South Carolina, South Dakota, Tennessee, Texas, Utah, Virginia) have signed or approved anti-Critical Race Theory bills or actions, with

another twelve states in the process of passing anti-Critical Race Theory legislation (Arizona, Connecticut, Illinois, Indiana, Minnesota, Missouri, Nebraska, New Jersey, North Carolina, Oregon, West Virginia, and Wyoming). Fourteen states proposed legislation, but it was either vetoed or stalled indefinitely (Alaska, Colorado, Kansas, Louisiana, Maine, Maryland, Michigan, New Mexico, New York, Ohio, Pennsylvania, Rhode Island, and Wisconsin). When passed, these bills have the potential to severely limit what teachers can teach in their classrooms, especially in social studies classrooms, as the curriculum deals with issues of race, racism, historical and current conflict, and social issues, among many other topics banned by this legislation. Even if the final versions of these bills contain less harsh language and restrictions, they symbolize a distrust in education and an endorsement of social studies curriculum based on master narrative. These pieces of legislation create a panoptic culture in which teachers, particularly social studies teachers, are watched.

### **Anti-Critical Race Theory Bills in Kentucky**

In Kentucky, support for proposed anti-Critical Race Theory bills has grown steadily since the summer of 2021 when legislators introduced Bill Requests 60 and 69. Although those died in committee, legislators introduced new bills in 2022 in both the House and Senate, with the Senate Bill passing in both the Senate and House in March of 2022. This bill is set to be implemented starting August 2023. The Senate Bill started as a smaller document that included a list of twenty-four mandated documents and language excusing teachers from discussing current events or controversial topics. This bill version noted that teachers must present multiple perspectives if they wish to discuss current events or controversial topics. Despite being passed in the Senate and the House, this bill

was vetoed by Kentucky governor Andy Beshear in April 2022 because it took power away from parents, site-based decision-making councils, principals, and teachers (Beshear, 2022). Additionally, Beshear wrote that the bill “attempts to dictate how teachers talk about U.S. History” and notes that the documents highlighted for inclusion in U.S. History courses “are aimed more at politics than history” (Beshear, 2022, pp. 7). Once vetoed, the original content of the Senate Bill was reincorporated into Senate Bill 1 (2022) with twenty-four fundamental documents (see Table 2) proposed for addition to the Kentucky Academic Standards for Social Studies. Kentucky State Senator and Education Committee chair, Max Wise, wrote in a guest column for the State Journal (2022) that the proposed bill is a “refocusing on teaching the American story and, rather than creating a divisive list of ‘don’ts,’ this bill establishes a list of ‘shalls’” (pp. 1). This bill passed, and the twenty-four documents are currently in the process of incorporation into the Kentucky Academic Standards for Social Studies.

Fundamental American Documents	
The Mayflower Compact;	Declaration of Rights of the Women of the United States;
The Declaration of Independence;	Atlanta Exposition Address by Booker T. Washington;
The Constitution of the United States;	Of Booker T. Washington and Others by W.E.B. Du Bois;
The Federalist No. 1 (Alexander Hamilton);	The United States Supreme Court opinion in Plessy v. Ferguson;
The Federalist Nos. 10 and 51 (James Madison);	New Nationalism speech by Theodore Roosevelt;
Speech on amendments to the Constitution of the 12 United States by James Madison;	
The Bill of Rights;	

Table 2 | Fundamental American documents as defined in Kentucky Senate Bill 1

The 1796 Farewell Address by George Washington;	State of the Union Address by Franklin D. Roosevelt;
The United States Supreme Court opinion in Marbury v. Madison;	The United States Supreme Court opinions in Brown v. Board of Education of Topeka;
The Monroe Doctrine by James Monroe; What to the Slave is the Fourth of July? speech by Frederick Douglass;	Letter from Birmingham Jail by Martin Luther King, Jr.;
The United States Supreme Court opinion in Dred Scott v. Sandford;	I Have a Dream speech by Martin Luther King, 13 Jr.;
Emancipation Proclamation by Abraham Lincoln;	A Time for Choosing by Ronald Reagan.
The Gettysburg Address by Abraham Lincoln	

Table 2 (continued) | Fundamental American documents as defined in Kentucky Senate Bill 1

Although the bill passed is not as extreme as its predecessors, it represents a shift in public and private attitudes toward social studies teachers. In a poll of Kentucky teachers conducted by the Kentucky Council for the Social Studies in March 2022, teachers at all grade levels were worried about how these bills would impact their teaching. Many expressed anxieties about their ability to teach social studies with fidelity if constrained by these mandates. With the passage of Senate Bill 1 and the addition of the mandated documents to the standards slated for implementation in August 2023, the distrust of educators and the social studies discipline has been cultivated and legitimized. Kentucky social studies teachers now teach in a charged climate with increased risks around teaching hard and controversial topics.

### **Contentious Social Studies in Charged Spaces**

As the field of social studies becomes more charged, considering the passage of censoring legislation that limits how teachers can implement inquiry and equity-based pedagogies, it is important to clarify common terms used to describe contentious social



studies. In this section, I will first clarify the difference between the terms hard history and controversial issues. I will then delineate social studies issues from topics and discuss how issues and topics are confused and the implications of that confusion. Finally, I will define the charged classroom before explaining the purpose and use of the notion of contentious social studies in charged spaces as it relates to this study.

### **Clarification of Terms**

The following terms are often used when discussing equity and inquiry-based curriculum and are sometimes used interchangeably. However, while hard history and controversial issues in social studies curricula overlap in some characteristics, they are distinct. Additionally, the distinction between these terms carries significant implications for social studies curriculum and instruction. In the following section, I will clarify the definitions of the terms hard history and controversial issue and will offer up my definition of contentious social studies as used in this study.

#### ***Hard History***

The term *hard history* comes from a 2018 report published by the Southern Poverty Law Center [SPLC]. The report assessed the teaching of American slavery in United States classrooms and found that American chattel slavery was not accurately or sufficiently taught in most social studies classrooms noting that American secondary social studies courses “teach about slavery without context” (p. 10), do not challenge progress narratives around enslavement, and do not acknowledge the structures created to uphold enslavement nor how those structures still influence society today. The report calls for an embracing of hard history in social studies and defines this notion through the example of slavery,

Slavery is hard history. It is hard to comprehend the inhumanity that defined it. It is hard to discuss the violence that sustained it. It is hard to teach the ideology of white supremacy that justified it. Moreover, it is hard to learn about those who abided it. (p. 5)

Slavery is not the only hard history in the United States history curriculum. Any topic which forces teachers and students to face the inhumane and violent acts committed, upheld, and perpetuated by humans is hard history. Therefore, the topics of American Indian removal, American Indian boarding schools, Japanese internment, Jim Crow laws, and de jure and de facto segregation fall into the category of hard history (Swan et al., 2022). Such historical topics stand as facts and should not be framed in a way that could encourage deliberation, as that would open space for students to deny the existence and/or significance of historical accounts of oppression.

### ***Controversial Issues***

The concept of teaching *controversial issues* in social studies has been around for a long time (Oliver & Shaver, 1974; Johnson & Johnson, 1979; Kelly, 1986). Social studies is made meaningful through the discipline's connection to issues that hold a moral, intellectual, and civic weight (Barton & Levstik, 2004; Westheimer, 2015). These issues invite questions that are worthy of being answered and are yet to be resolved (Oliver & Shaver, 1973; Swan et al., 2018). As such, they require teachers to facilitate productive argumentation as students seek to answer them, and teacher facilitation requires pedagogical techniques to ensure argumentation is authentic, safe, and productive (Hess, 2009).

Although teaching controversial issues is foundational to teaching social studies, the term is often misunderstood or misused. In her 2002 study, Diana Hess defined controversial public issues as “unresolved questions of public policy that spark significant disagreement” (p. 11). Her findings in this initial study hit on perennial themes in research around controversial issues; namely, teacher facilitation is essential (Garret & Alvey, 2021; Reisman et al., 2020), school and community support is necessary (Camicia, 2008; Washington & Humphries, 2011; Brkich & Newkirk, 2015; Moffa, 2022), and choices around facilitation are intentional and in line with teacher positionality and context (Engebretson, 2018; Conrad, 2020). Hess clarifies her 2002 notion of teaching controversial public issues in her 2009 book, saying controversial political issues spark disagreement and are,

...authentic questions about the kinds of public policies that should be adopted to address public problems—they are not hypothetical. Such issues require deliberation among a “we” to determine which policy is the best response to a particular problem. These are the public’s problems; as such, they both deserve and require the public’s input in some cases... and the public’s actual decision in others. (p. 37)

In some ways, the term controversial is a misnomer in that the controversial nature is derived not from disagreement but from students' ability to engage in deliberation. Where disagreement is static, deliberation is active. Grounding curriculum that features controversial issues requires such issues to stem from authentic questions that students can deliberate and, in some cases, spark informed action. The C3 Framework and IDM are tightly aligned with this approach to social studies curriculum design (NCSS, 2013).

## **Topics versus Issues**

Hess (2009) carefully delineates between deliberative issues and difficult topics (or hard history as the SPLC calls it). Hess (2009) carefully defines the difference between an issue and a topic by saying “a topic can be an event (such as the Iraq War), a place (the Middle East), or a process (such as immigration or nuclear disarmament)” (p. 40). Topics or problems are broad and exist as curricular content in the classroom, rather than a pedagogical approach to content. Student deliberation can lead to uncivil or hurtful discussion when topics are inappropriately framed as deliberative. This is because topics are too broad for deliberation and are not controversial in that the topic does not call for students to address both sides. For example, Indian Removal in the 1800s is a difficult historical topic as it encompasses the inhumane and oppressive treatment Indigenous people experienced in the face of colonialist American expansion. This topic is not something students should deliberate as it represents a litany of historical material (how are students to know what exactly they are to deliberate?) and, most importantly, setting this topic up for deliberation would position students to potentially make problematic arguments as students often try to deliberate both sides of a topic (how are we setting students up not to debate the pros and cons of Indian Removal?).

Within Hess’s (2009) notions of issues and topics, hard histories are considered topics and, in and of themselves, should not be presented through a deliberative lens. However, it is possible to find deliberative angles within difficult topics that set students up for deliberation without the risk of problematic discussion. For example, while American chattel slavery and the historical record surrounding it is not a debatable issue, teachers may find a deliberative angle. The idea of reparations is a controversial issue

related to the difficult topic of American chattel slavery. Students are not deliberating slavery, but rather debating how America should reckon with the impacts of structural racism stemming from slavery (Swan et al., 2022). Framing (Entman, 2004) the issue is essential to ensuring students can engage in deliberation and take argumentative stances that align with universal values, morals, and ethics (Swan et al., 2018). Framing historical issues in this way allows for productive deliberation and guards against problematic arguments that would violate universal ethics and morals.

### ***Confusing Topics and Issues***

Looking at deliberative issues and difficult topics, there is a history of confusing the two. Confusion can happen because of how a community's historical narrative frames a topic or if a community's values, ethics, and morals do not align with the teacher or curriculum writer's values, ethics, and morals. The literature supplies two exemplars of how confusion around topics and issues can complicate how social studies teachers design and deliver social studies curricula. The first example shows how a community's historical narrative can contribute to current confusion. The second example shows how discrepancies between teachers and community members over values, ethics, and morals can create confusion resulting in social studies teachers facing challenges when teaching curriculum.

First, Camicia (2008) writes about a case in which community members contested a district's approach to teaching about Japanese Internment by arguing that this was a deliberative issue,

Although local and national communities supported the claim that the WWII internment of Japanese Americans was wrong and not controversial, these claims were challenged by a small group of Telford activists who believed that the internment was done out of military necessity. (p. 299)

Camicia shares that the Washington state town's history contributed to the conflict over curriculum as the town featured in the case study expelled Japanese people during World War II. Teaching about Japanese Internment confronted local narratives around internment, which led to emotional reactions and pushback. These narratives were personal as they represented ways community members negotiated their feelings about their involvement in internment. In their piece about emotionality in secondary social studies classroom discussions around controversial issues, Garret and Alvey (2021) cite the sociological concept of “‘the deep story’ to signify the ways personal histories, identities, and emotional investments shape how individuals orient to the world of politics” (p. 1). Students' and communities' lived experiences impact the social studies classroom as their identity complicates how they understand and interpret social studies curriculum.

In Florida, Washington and Humphries (2011) document confusion around deliberative issues and difficult topics stemming from discrepancies between teacher and community values, ethics, and morals. They note that teachers in predominantly white, rural schools can,

...encounter unique difficulties with classroom discussion when white students view as “open” specific issues around topics of race (e.g., slavery, biracial marriage) that are generally considered not only closed but uncontroversial in the

larger society... In such instances, these seemingly safe issues *become* “controversial” *within that particular setting* because the students (1) openly express racist viewpoints, and (2) marginalize or exclude their classmates of color by expressing these views. (p. 95)

Deliberation of controversial issues in such circumstances (i.e., where racist viewpoints are present, and students feel empowered to express them) is not only difficult because of safety threats considering confusion around deliberative issues and difficult topics but also challenges the pedagogical approach of deliberation as teachers are tasked with first establishing baseline beliefs around civil and human rights issues. Such challenges have only grown since 2011 with hate groups like the Proud Boys gaining legitimization and endorsement in the mainstream political sphere during the Trump presidency (Costello, 2016; Justice & Stanley, 2016; Journell, 2017; Sibbet & Au, 2018). Today, much of the contentiousness around social studies stems from the conflation between hard history and controversial issues.

### **The Charged Classroom**

Pace, in her 2015 book, *The Charged Classroom: Predicaments and Possibilities for Democratic Teaching*, defines the *charged classroom* as one in which “the tensions of public school teaching and their interaction with contemporary issues are played out” (p. 4). Later, in her 2019 book about teaching controversial issues, Pace further describes a charged classroom as one that is “full of opportunities for democracy the same time, rife with tensions inherent to teaching that have been intensified under education, yet, at current conditions such as school testing policies and political polarization in the wider society” (p. xx). In states with social studies standards based on the C3 Framework and

legislation censoring social studies teachers, tensions are high around social studies curriculum and instruction. The extreme political polarization in American society pressures teachers to teach the *right* kind of history. As national and local conversations question the true purpose of social studies and send messages about teachers' autonomy and professional judgment, the social studies classroom is a charged classroom. The pressures exerted on social studies classrooms during charged times complicate the clear delineation between controversial issues and difficult topics because there can be incongruence between how the social studies field defines topics and issues and how the public defines them. Identifying the context in which teachers are teaching as charged emphasizes the nuanced challenges teachers are facing as they implement social studies curriculum and instruction.

### **Contentious Social Studies in Charged Spaces**

For this study, I will synthesize key elements from the above concepts to clarify my case of interest: contentious social studies in charged spaces. What has recently become difficult about the distinction between a controversial issue and hard history topic is that many current anti-Critical Race Theory bills have conflated the two and/or have exposed existing confusion about the difference between a debatable issue and a difficult topic. For example, language within proposed bills, like the ones in Kentucky, talk about “discuss[ing] a current event<sup>1</sup> or topic... from diverse and contending perspectives...” (House proposed change to Senate Bill 138). At face value, this decree is in line with the

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<sup>1</sup> Hess (2009) notes that *current events* is often used as a stand in term for *controversial political issues*



deliberative model for teaching with controversial issues, excluding the bill's call for discussing contending perspectives of topics. However, including the term topic and the overall ambiguity of the language opens the bill up for misinterpretation. Community members and teachers may misinterpret the language as calling teachers to show contending perspectives of all content. Such confusion played out in the summer of 2021 in Texas when legislators passed House Bill 3979. This bill stated,

Teachers who choose to discuss current events or widely debated and currently controversial issues of public policy or social affairs shall, to the best of their ability, strive to explore such issues from diverse and contending perspectives without giving deference to any one perspective. (Subsection 2)

Gina Peddy, the executive director of curriculum and instruction for Carroll Independent School District, was recorded saying, "make sure that if you have a book on the Holocaust, that you have one that has an opposing, that has other perspectives" (Diaz, 2021). The district later apologized for her comment and clarified that they "understand this bill does not require an opposing viewpoint on historical facts" (Diaz, 2021). However, the incident exposes confusion about the difference between an issue and a topic as well as the role of deliberation in pedagogical practice that is not confined to this one incident as a similar one occurred in Indiana, which resulted in the Senate killing the proposed anti-Critical Race Theory (Wang, 2022). Part of Peddy's misinterpretation of the bill is the misunderstanding that the Holocaust is a historical topic that represents a hard history and is not a debatable issue. Confusion around the inclusion of deliberative issues is exposed and made worse in the current culture wars around social studies curriculum and instruction.

Therefore, to account for how the current political climate complicates the understanding of controversial issues and difficult topics, I am using the term *contentious social studies*. Contentious social studies is social studies that features content where there is disagreement between educators and community members over the status of the content as open or closed to deliberation.

### **Deliberation and Argumentation in Social Studies**

Inquiry-based social studies call on teachers to design and implement curriculum that features deliberation grounded in argumentation. Centering deliberation and argumentation in social studies curriculum becomes difficult when the issues and topics are contentious and the atmosphere is charged. These difficulties become even more pronounced when teachers also center equity-based approaches to social studies. In this section, I will review the role of deliberation within the C3 Framework. Then, I will look at scholarship around deliberation within equity-based social studies curriculum and identify how each does and does not contribute to white privilege pedagogy.

#### **Deliberation within the C3 Framework**

The C3 Framework (NCSS, 2013) defines deliberation as “discussing issues and making choices and judgments with information and evidence, civility and respect, and concern for fair procedures” (p. 104). Deliberation lays the groundwork for argumentation in that students must engage in deliberation—either internally or with others—before engaging in argumentation. Engaging in deliberation does not necessarily mean teachers must teach through discussion (although Hess makes the argument that deliberative discussion is vital to democratic education) as students may engage in deliberation and argumentation in many forms and at differing levels (Figure 1).



Figure 1 | Levels of Deliberation

For example, students may engage in internal deliberation by crafting an argument in response to evaluating evidence. This form of deliberation may become communal if the student shares their argument with others and engages in a discussion. Still, deliberation at the communal level does not need to occur for students to engage in deliberation. Likewise, deliberation can occur communally if it is structured in such a way as evidence is presented from participants in the deliberative process for others to consider in their construction of an argument in response to the controversial issue. However, even in a communal deliberative space, students will still engage in internal deliberation to arrive at their own conclusions.

Teaching controversial issues through deliberation is good social studies as it fosters pluralistic democracy and builds the foundation for tolerance and greater civil rights (Parker, 2006). Teaching through deliberation requires teachers to ensure they continuously monitor the balance of openness and safety in their classroom to ensure that

deliberation is a constructive pedagogical practice that does not open space for teachers and/or students to inflict harm on each other (Hahn, 1998; Gayle et al, 2013).

### **Deliberation in Equity-based Social Studies**

Longstanding pedagogical approaches to teaching controversial issues are being reexamined for their effectiveness, impact, and riskiness considering new challenges to their inclusion in the classroom. Among conversations around the purpose of social studies as well as the constraints on social studies curriculum during the current culture wars, some scholars have pushed back on the central role of deliberation in the social studies classroom. First, considering the discipline's turn toward centering equity-based curriculum and instruction (Hawkman, 2020; King, 2019; Sabzalian et al., 2021), scholars have critiqued deliberation as a normative approach that serves hegemonic structures (Gibson, 2020). Specifically, they contend that how deliberation is currently conceptualized does not account for how power structures permeate the classroom. Additionally, within contentious political climates and normative racism, scholars reconsider the balance between a classroom open to all viewpoints and one safe for all students. In response to such threats, scholars call for alternative approaches to deliberation that guard against problematic ideas in the classroom (Gibson, 2020; Hlavacik & Krutka, 2022). I contend that while these scholars raise legitimate concerns about the functionality of deliberation within hegemonic systems that must be addressed, their proposed solutions misrepresent the difference between a deliberative issue and hard topic and do not consider the risks present in teaching equity-based social studies in charged spaces.

### *Counternarration*

Critical scholars state that American democracy is an ideal, not a reality in that civil and human rights and protections are not extended to all citizens (Kendi, 2016; Hannah-Jones, 2019). In the absence of a just democracy, Gibson (2020) raises concerns about the power dynamics in classroom deliberation and critiques the practice using concepts from Critical Race Theory. The primary flaw Gibson finds in democratic deliberation is that current approaches do not consider the reality that “the United States is currently a deeply unequal nation, as it has been since its founding” (p. 431) and “that deliberation can fail to equip students with the power literacy necessary to navigate the hierarchies of our unequal political system, which operate within and beyond deliberative spaces” (p. 439). Gibson notes that “calls for civility and common ground can create false equivalencies between those who seek to expose and dismantle policies rooted in racial oppression and those who support racialized and racist status quo” (p. 432). In short, she posits that deliberation gives voice to those who already hold the power in American democracy (i.e., white, straight, cisgender citizens) and that democratic deliberation in the classroom normalizes and promotes the status quo. Additionally, the thinking Gibson points out as problematic is the type of thinking that can lead to the false assertion that both sides of every argument must be equally presented in social studies instruction.

Gibson offers *counternarration*, from the field of Critical Race Theory (Delgado & Stefancic, 2017), as an approach to deliberation that is cognizant of power dynamics. She advances that,

...a democratic pedagogy of counternarration would intentionally ask students to investigate, question, and speak out against the taken-for-granted ‘common sense’

of political discourse and power and to instead narrate or amplify perspectives that challenge political status quo and that make visible power operates within political discourse and action. (p. 440)

Counternarration is a rigorous, and important, tool to use in the social studies classroom. However, it does not provide a path toward including the deliberation of *all* contentious issues in a charged classroom. Teachers can address imbalanced power structures in deliberation by framing difficult topics into deliberative issues which do not call for students to argue against a classmate's humanity or rights and close opportunities for arguing both sides of decided topics (Entman, 2004).

Gibson is correct in the assertion that not all topics are up for debate in an unequal society, that the United States is severely unequal, and teachers must work against upholding hegemonic structures. However, I contend that Gibson is conflating deliberative issues with difficult topics. Although her argument counters the bad faith arguments found in anti-Critical Race Theory bills in that those bills call for topics to be taught from all sides, in focusing her argument on topics, she misrepresents deliberation and misses the chance to address the deeper and nuanced problems of deliberating contentious issues during charged times.

### ***Civic Litigation***

Similarly to Gibbons (2020), Hlavacik and Krutka (2022) also critique democratic deliberation and argue that deliberation is not always the best fit for critical inquiry because it forces a dichromatic approach to issues of justice. In an interview (Visions of Education, 2022), Krutka references an inquiry he designed around voter restriction and

reflects that his compelling question—Are voter ID laws democratic?—is problematic because it would allow space for students to argue for voter suppression. He and Hlavacik offer the idea of *civic litigation*, in which deliberative social studies content around themes of injustice are framed in terms of responsibility. Krutka revises his voter ID question—Who is responsible for voter suppression?—and argues that questions of responsibility allow teachers to ground critical inquiry in deliberation. Although I agree that deliberation is not a foolproof pedagogical tool and can, when inappropriately framed “result in false equivalencies, allow space for racist arguments, or result in uninformed arguments that ignore evidence” (Hlavacik & Krutka, 2022), the solution rests in the framing of the content, rather than turning to an emphasis on assigning responsibility for injustices. Focusing on responsibility, especially during charged times and in a politically polarized society may prove unproductive (if not counterproductive) to effective social studies because it emphasizes a liberalist approach to social justice while also ignoring the influence of student identity and the ways their identities complicate their engagement with historical narratives (Camicia, 2008; Washington & Humphries, 2011).

### **White Privilege Pedagogy**

These scholars’ concerns are valid as societal inequalities can result in violence and death. Perpetuating inequalities in the classroom is not an option and scholars should continue to study how classrooms and deliberation can be more equitable. The critiques I offer, therefore, are not aimed at their goals as I too work towards the same objective. The stakes of letting racist and bigoted viewpoints into the classroom are high and, therefore, teachers must seriously consider the impact their pedagogical choices and

framing of content have on the safety of their classroom. However, while I understand their critiques, their characterization of deliberation and proposed methods of framing deliberative instruction miss the mark because they misrepresent and oversimplify controversial issues. Counternarration and civic litigation exemplify *white privilege pedagogy* (Levine-Rasky, 2000), in that they overemphasize the individual in structural inequality and fail to provide clear calls to action after counternarratives and responsibility is acknowledged. In Crowley and Smith's (2020) critique of *white privilege pedagogy*, they point out that this approach to social studies curriculum and instruction oversimplifies structural racism and fails to enact real change as students either resist such instruction or "protect themselves from complicity" (p. 3). Such approaches are divorced from any real action that would dismantle racist structures.

### **Inquiry and Equity-based Social Studies in Charged Times**

Teaching controversial issues is not an easy task and not all teachers embrace teaching controversial issues through a deliberative approach because of the risks and challenges they face. Researchers have categorized teachers' approaches to teaching controversial issues into a continuum of attitudes. In this section, I will identify the risks and challenges teachers face when teaching deliberative issues and note internal and external teacher attitudes towards deliberative issues.

### **Risks and Challenges in Charged Times**

Before the introduction and passage of anti-Critical Race Theory legislation, there were challenges to teaching controversial issues. These challenges are well documented and can provide insight about the current challenges Kentucky teachers face in their classrooms. Although there is an extensive list of challenges to teaching controversial



issues (e.g. parent pushback, political climate, teacher choice, etc.), they distill down into two challenges: managing the emotional reactions of students and parents and navigating content that threatens student identity.

### ***Emotionality***

Many scholars talk about the role of emotions in teaching deliberative issues using difficult topics and how teachers must be prepared to manage and work through emotionality in deliberation. Teachers who teach about hard histories (SPLC, 2018) must be “prepared to address the emotional dimensions of facilitating discussions around racialized history” (Reisman et al., 2020). Teachers may try to minimize and contain the emotionality of deliberation by asking students to ground their discussion and argumentation in evidence (Reisman et al., 2020). However, even sources can become emotionally charged because “how students regard evidence and whether their evaluation of evidence differs depending on the context of the issue... [may be] shaped by one’s sociocultural identities” (Jacobson et al., 2018, p. 289). Additionally, some teachers use distancing to manage the emotionality of difficult histories by either distancing their community’s identity from difficult histories or distancing the histories themselves from the classroom curriculum as being decidedly in the past (Klein, 2017). The rationale for such distancing is that deliberating past events which are distanced from current ones allows students to practice deliberation in the abstract before engaging in deliberation around modern issues which are emotionally charged. However, “...transferring patterns of reasoning from past to present is a very difficult undertaking for students and is unlikely to occur without direct support by teachers” (Barton & McCully, 2007, p. 127). Moreover, the C3 Framework’s fourth dimension, Communicating Conclusions and

Taking Informed Action, highlights the notion that the past is connected to the present and that all of history can be tied to perennial problems and injustices. Likewise, the rise of political polarization and identity politics makes it difficult for teachers and students to separate themselves and their identities from current controversial issues (Conrad, 2020).

Teachers must then develop a capacity to guide students through the inevitable emotionality of deliberating issues. Practicing deliberation with issues that hold less emotion for students not only produces lackluster social studies but does not adequately allow students to practice managing emotions during deliberation. Garret and Alvey (2021) offer that emotions are “inherent parts of (rather than extra to) political discussion” (p. 1), and teachers must be prepared to address emotions to protect the safety of the classroom. Therefore, teachers must learn to productively manage emotions as part of educating for democracy and social justice.

### ***Threatened Identity***

The emotionality of current issues is rooted in teachers, students, and the communities’ self-conceptions. Garret and Alvey (2021) present the sociological idea of the *deep story* (Hochschild, 2016) to communicate the role of identity in engaging in teaching and learning about controversial issues. When content threatens students' and/or communities’ identity, students may disengage or push back and assert their worldview. In Zembylas and Bekerman’s 2008 study, they define content that threatens group identity as *dangerous memories* and talk about how such content is “disruptive to the status quo” (p. 125). Therefore, teachers must consider identity when teaching controversial issues to understand how to work through identity threats in ways that encourage students to challenge normative narratives.

For example, Goldberg’s 2017 study examined how Jewish teachers and students in Israeli schools learned about the Holocaust and the Palestinian refugee problem. He noted how teachers approached each topic and students’ reactions. Goldberg found that students struggled to learn about topics that threatened their sense of identity, not topics deemed traumatic or hard, as students positively engaged in learning about the Holocaust, a very difficult and violent history, because what they learned about the Holocaust matched their Jewish identity. However, learning about hard histories in which their group was the aggressor proved difficult for students and showed a “reluctance of learners to acknowledge an alternative narrative” (Goldberg, 2017, p. 363). Goldberg’s findings suggest that what is difficult about hard history is not necessarily learning about past injustices or acts of violence—Jewish Israeli students embraced learning about the horrors of the Holocaust and intuitively knew the importance of learning about such a traumatizing event—but rather how some histories threaten group identity. This holds true in other contexts like Northern Ireland, Canada, and the United States (Barton & McCully, 2007; Miles, 2019, Moffa, 2022).

### ***Pushback***

Therefore, teaching controversial issues goes beyond the pedagogical mechanics of facilitating historical inquiry and discussion. When engaging in such issues, deliberation opens opportunities to challenge normative narratives and perspectives, something which surfaces emotional reactions in response to identity threats. Teachers must be prepared to work to navigate the emotionality and identity threats that emerge in this process to encourage engagement, rather than pushback (Brkich & Newkirk, 2015).

## Teacher Attitudes Towards Controversial Issues

Teachers' attitudes toward teaching controversial issues reflected the charged nature of the modern classroom. Now, more than ever, there are risks associated with teaching through deliberation, especially when the content features difficult topics. In this section, I will present how researchers categorize teacher attitudes toward teaching controversial issues by, first, focusing on internal influences on teachers' attitudes and then, reviewing external influences on teachers' attitudes.

### Internal Influences on Attitude

Hess (2004) broke down approaches to controversy in the curriculum into the following four groups: denial, privileged, avoidance, and balance (Table 3). These curricular approaches clarify how teachers approach controversy in the curriculum and speak to internal reasons why a teacher might engage or disengage with a controversial issue. However, Hess's approaches to controversial issues leave out external factors which may influence the choices a teacher makes around teaching controversial issues.

Hess (2004)	Descriptions
Denial	"It is not a controversial political issue: 'Some people may say it is controversial, but I think they are wrong. There is a right answer to this question'" (p. 259)
Privilege	"Teach toward a particular perspective on the controversial political issue: 'It is controversial, but I think there is a clearly right answer and will try to get my students to adopt that position'" (p. 259)
Avoidance	"Avoid the controversial political issue: 'The issue is controversial, but my personal views are so strong that I do not think I can teach it fairly, or I do not want to do so'" (p. 259)
Balance	"Teach the matter as genuine controversial political issue: 'The issue is controversial, and I will aim for balance and try to ensure that various positions get a best case, fair hearing'" (p. 259)

Table 3 | Hess's (2004) Four Approaches to Controversial Issues in the Curriculum

## External Influences on Attitude

Kitson and McCully (2005) and Pace (2021) factor in outside influences on teachers' approaches to controversial issues. Kitson and McCully in their 2005 study categorized teacher attitudes towards teaching controversial issues into the categories of avoiders, containers, and risk-takers. Pace (2021) added a fourth category of contained risk-taking (Table 4). These approaches consider the impact of external factors on a teacher's choice to engage students in controversial issues in that they studied teachers in contentious places (Kitson & McCully, 2005) and conducted their research in the contentious climate of Northern Ireland and Pace (2021) conducted her research in the contentious climates of Northern Ireland, England, and the American Midwest). In these locations, factors beyond how a teacher felt about a controversial issue influenced classroom dynamics and made their inclusion risky in that teachers were tasked with managing the emotionality of controversial issues as well as the ways in which such issues spoke to the identities of their students.

Kitson, McCully, and Pace's Approaches	Descriptions
Avoiders	"Avoids teaching topics that might be controversial. Purpose of teaching history is to make students better at history" (Kitson & McCully, p. 4)
Containers	"Controversial issues are taught but contained through the historical process. Pupils are not encouraged actively to engage in the root of the controversy. Might teach parallel topics that are not too close to home" (Kitson & McCully, p. 4)

Table 4 | Kitson and McCully (2005) and Pace's (2021) approaches to teaching controversial issues

Contained Risk-takers	<p>“...careful calibration of risk...that struck a compromise between openness and safety...” (p. 229)</p> <p>“... encourages the teaching of controversial issues with sensitivity, pragmatism, integrity, and protection from harm” (p. 253)</p>
Risk-Takers	<p>“Fully embraces the social utility of history teaching. Consciously links past to present. Seizes opportunities to tackle controversial issues. Not afraid to push the boundaries” (Kitson &amp; McCully, p. 4)</p>

Table 4 (continued) | Kitson and McCully (2005) and Pace’s (2021) approaches to teaching controversial issues

In including the impact of place on teachers’ approaches to teaching controversial issues, Kitson, McCully, and Pace recognize the many challenges teachers navigate when teaching controversial issues.

### **Theoretical Framework**

Researchers have spent decades studying how to incorporate controversial issues in the classroom better, considering the many nuanced challenges such an approach contains. The current climate of American society exacerbates the challenges of teaching controversial issues, and those challenges are further heightened when adding in the complexity of cultural influences on the classroom. Therefore, in spaces where teaching controversial issues are especially charged (like in states with standards based on inquiry and equity that also have anti-Critical Race Theory legislation), teachers must contain the risk of teaching controversial issues through their pedagogical choices. In this final section, I will discuss Pace’s notion of *contained risk-taking*, the theory of inquiry as highlighted in the *Questions, Tasks, and Sources (QTS) Observational Protocol*, and then synthesize how Pace’s suggestions for containing risk align with the QTS Protocol’s.

## **Contained Risk-Taking**

Pace’s research in Northern Ireland, England, and the American Midwest produced the notion of *contained risk-taking*, an approach to teaching controversial issues which call on teachers to approach controversial issues intentionally, methodically, and reflexively. She breaks this approach down into eight dimensions: cultivation of warm, supportive classroom environments; thorough preparation and planning; reflection on teacher identity and roles; proactive communication with parents, other teachers, and administrators; careful selection, timing, and framing of issues; emphasis on creative resources and group activities; steering of discussion; and dealing with emotional conflicts (Pace, 2021, pp. 162-163). These dimensions consider the challenges presented through decades of research on teaching controversial issues in contentious places and offer guidance on navigating such challenges (Table 5).

## **Questions, Tasks, and Sources (QTS) Observational Protocol**

The IDM breaks the theory of inquiry down into questions, tasks, and sources. In 2020, Swan, Crowley, and Swan further clarified each dimension of the IDM in their article introducing the QTS Protocol. The protocol helps educators hone the signal of inquiry within social studies instruction by defining effective use of questions, tasks, and sources (Table 5). The protocol defines “use of questions” (Swan et al., 2020, p. 102) as framing content and setting up argumentation, performance tasks as “formative and summative ... tasks that provide a feedback loop to inform and improve instruction” (p. 102), and sources as the foundation for constructing arguments. The protocol aids observers in noting where and how inquiry is utilized in social studies curriculum and instruction.

## Containing Risk with Inquiry

Pace’s (2021) theory of contained risk-taking and Swan et al.’s (2013) theory of inquiry as operationalized and described in the IDM (Swan et al., 2018) and QTS Protocol (Swan et al., 2020) together provided the mechanism by which I analyzed how social studies teachers used inquiry-based lessons to contain the risk of teaching contentious social studies in charged spaces. The IDM was the primary framework with Pace’s work providing clarifying language around teaching in contentious climates (Table 5).

QTS Observation Protocol	Contained Risk-Taking Framework
<p><b>Questions</b></p> <p>Teacher uses compelling question/s to frame and guide instruction. CQ is rigorous, relevant, and provides an opportunity for students to craft evidence-based arguments.</p> <p>Teacher builds students’ knowledge through the use of supporting questions. SQs are intentionally sequenced and clearly related to the big ideas within the CQ.</p> <p>Teacher uses supporting questions aligned with tasks and sources.</p> <p>Teacher provides instructional space for student generated questions.</p> <p>Teacher uses questions to check for students’ understanding and to engage students in the content. Questions connect to prior knowledge, promote curiosity, connect to out-of-classroom contexts</p>	<p><b>Prepare Thoroughly</b></p> <p>Pay attention to student identity and development, teaching contexts, subject matter, purposes, and methods.</p> <p><b>Select Authentic Issues</b></p> <p>Frame questions to promote student engagement and inquiry, progressing from cooler to hotter issues.</p> <p><b>Guide Discussion</b></p> <p>Guide discussion with tools for analyzing sources, exchanging ideas, moving from small groups to whole group, and attending to equity.</p>

Table 5 | Using inquiry (Swan et al., 2020) to contain risk (Pace, 2021).



<p><b>Performance Tasks</b></p> <p>Teacher uses a variety of formative performance tasks to provide students feedback on their progress and to check for understanding.</p> <p>Teacher uses formative tasks to target argumentation skills and other important disciplinary work within the social studies.</p> <p>Teacher uses argumentation as a cornerstone of the students’ summative evaluation.</p> <p>Teacher is clear about the qualities of a good argument (evidentiary, reasoned, accurate, and clear) and helps students in building better arguments by providing meaningful feedback.</p> <p>Teacher provides opportunities for students to express their understanding through extension tasks and by taking informed action.</p> <p>Teacher provides opportunities for cooperative learning experiences that promote individual accountability and group interdependence.</p>	<p><b>Select Authentic Issues</b></p> <p>Frame questions to promote student engagement and inquiry, progressing from cooler to hotter issues.</p> <p><b>Choose Resources and Pedagogies</b></p> <p>Choose resources and pedagogies that challenge assumptions, include diverse voices and perspectives, and foster participation.</p> <p><b>Guide Discussion</b></p> <p>Guide discussion with tools for analyzing sources, exchanging ideas, moving from small groups to whole group, and attending to equity.</p>
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Table 5 (continued) | Using inquiry (Swan et al., 2020) to contain risk (Pace, 2021).

<p><b>Disciplinary Sources</b></p> <p>Teacher uses a variety of source types to engage students (e.g., images, text, video).</p> <p>Teacher uses sources that demonstrate multiple perspectives (e.g., inclusion of marginalized perspectives, conflicting evidence on a topic).</p> <p>Teacher adapts sources (e.g., excerpt, annotate, modify) and creates instructional scaffolds to address learner needs.</p> <p>Teacher uses sources that help students complete formative and summative tasks in order to answer compelling and supporting questions.</p> <p>Teacher uses sources that demonstrate deep knowledge of the subject matter.</p>	<p><b>Select Authentic Issues</b></p> <p>Frame questions to promote student engagement and inquiry, progressing from cooler to hotter issues.</p> <p><b>Choose Resources and Pedagogies</b></p> <p>Choose resources and pedagogies that challenge assumptions, include diverse voices and perspectives, and foster participation.</p> <p><b>Guide Discussion</b></p> <p>Guide discussion with tools for analyzing sources, exchanging ideas, moving from small groups to whole group, and attending to equity.</p>
<p><b>Learning Environment</b></p> <p>Teacher creates a learning atmosphere that engenders respect for one another and toward diverse populations.</p> <p>Instruction is contextualized in students' lives, experiences, and individual abilities.</p> <p>Students have choices based upon their experiences, interests, and strengths.</p> <p>The curriculum and planned learning experiences provide opportunities for the inclusion of issues important to the classroom, school, and community.</p> <p>The teacher communicates high expectations for all students.</p>	<p><b>Cultivate a supportive environment</b></p> <p>Community building, norms, openness to dissent, individual affirmation, and humor.</p> <p><b>Communicate Proactively</b></p> <p>Communicate with students, parents, colleagues, and administrators about issues that will be studied.</p> <p><b>Address Emotions</b></p> <p>Create space for processing emotions, using de-escalation moves as needed, and developing self-awareness.</p>

Table 5 (continued) | Using inquiry (Swan et al., 2020) to contain risk (Pace, 2021).

The QTS Protocol indicators align with the risks Pace (2021) identified in her framework for contained risk-taking as the purpose of questions, tasks, sources, and learning environment for inquiry are further clarified for their ability to contain risk in Pace's eight dimensions.

### **Summary**

The field of social studies is at a crossroads as calls to center inquiry and equity-based social studies are met with resistance in the form of legislation censoring social studies curriculum and instruction. Social studies teachers are left to navigate how best to deliver inquiry and equity-based instruction considering the risks such approaches might contain considering public confusion and pushback to centering deliberative issues and difficult topics. Scholars have offered approaches to deliberative social studies centered on issues of equity, but those approaches do not necessarily account for the unique challenges social studies teachers currently face in states that have passed legislation limiting teacher autonomy in the social studies classroom. To understand the current terrain social studies teachers now find themselves, I used Pace's (2021) theory of contained risk-taking and Swan et al.'s (2013) theory of inquiry as operationalized and described in the IDM (Swan et al., 2018) and QTS Protocol (Swan et al., 2020) to understand how social studies teachers use inquiry-based lessons to navigate teaching contentious social studies in charged spaces.

## **Chapter 3**

### **Methodology**

This study utilized an explanatory qualitative methodology to conduct a case study analysis of two in-service, early-career, secondary Social Studies teachers in a public high school in a semi-rural county in Kentucky. The case study centered on the choices teachers made around curriculum design during the diagnosing, designing, delivering, and debriefing phases of instructional design. Specifically, it examined teacher choices during these phases when using inquiry-based learning to teach a contentious issue. The goal was to understand how these two teachers used questions, tasks, and sources to navigate teaching contentious social studies under the pressures and constraints of an increasingly polarized and charged society (Pace, 2015). The risks, in this case, consist of student, parent, community, or political pushback to instruction. Yin (2018) offers Schramm's 1971 definition of a case study: "The essence of a case, the central tendency among all types of case study, is that it tries to illuminate a decision or set of decisions: why they were taken, how they were implemented, and with what result" (p. 14). This definition lines up with my intentions for this inquiry in that I wish to "illuminate" (Yin, 2018) the choices these teachers make when using inquiry to design and deliver social studies curriculum featuring a contentious issue in charged times. Pace (2015) defines the charged classroom as one where "the tensions of public school teaching and their interaction with contemporary issues are played out," (p. 4). Therefore, this study focuses on how teachers navigate the tensions created by contemporary issues, notably pushback against inquiry and equity-based social studies instruction, in their classrooms. My study was guided by the following research questions:

1. How do two in-service secondary teachers use inquiry-based instruction to navigate teaching contentious social studies during charged times?
2. What curricular and pedagogical choices were made by the in-service teachers to navigate risk when *designing* inquiry-based instruction that features contentious social studies during charged times?
3. What curricular and pedagogical choices were made by the in-service teachers to navigate risk when *delivering* inquiry-based instruction that features contentious social studies during charged times?

To explore questions, I purposively selected (Merriam, 1998) two secondary social studies teachers in a public high school in a semi-rural county in Kentucky who were familiar with the IDM and used inquiry-based practices in their teaching. Additionally, these teachers perceived a tension between how they interpret social studies content and how their community interpreted it. I interviewed and observed these teachers as they taught a two-week unit containing a teacher-identified contentious content that features inquiry-based instruction. I collected curriculum artifacts from the unit and de-identified student work from the inquiry-based instruction. Finally, I formally interviewed the teachers before and after the unit and conduct informal interviews during the unit.

### **Rationale**

Teaching contentious issues in a social studies class is a difficult undertaking that requires teachers to skillfully design and implement instruction in ways that navigate rocky and, often, uncharted terrain. Although there is research, both internationally and nationally, addressing the complexities and nuances of teaching controversial or

contentious topics in politically charged times (Kitson and McCally, 2005; Goldberg, 2017; Ho et al., 2017; Kawashima-Ginsberg & Junco, 2018), there is very little research addressing the complexities of doing so in a post-2020 America (Journell, 2016, 2017) and even less research focusing on how factors like rurality and political polarization impact in-service teacher practice (Moffa, 2022). This study used a qualitative case study approach to explore the experience of two teachers in a public high school in a semi-rural county in Kentucky when teaching contentious social studies and the choices they made in response to challenges as they implemented inquiry-based instruction.

This study took a constructivist approach to qualitative research as I was concerned with the “meaning [that] is socially constructed by individuals in interaction with their world” (Merriam, 2002, p. 3). Qualitative methods allowed me to observe and question a phenomenon with no clear or correct answer to understand it more deeply. My research aimed not to prove a theory, settle a debate, or provide an answer. Instead, my aim was to understand how two teachers, in a unique setting, dealt with unique circumstances and constructed meaning.

### **Research Paradigm**

Within the qualitative approach, I conducted my study under the constructivist paradigm as I was concerned with the sensemaking around an event. Creswell and Clark (2018) note that the constructivist paradigm seeks to *understand* a phenomenon and acknowledges the existence of multiple meanings. Specifically, Creswell and Clark (2018) define the constructivist worldview as: “the understanding or meaning of phenomena, formed through participants and their subjective views” (p.36). He goes on to say that “when participants provide their understandings, they speak from meanings

shaped by social interaction with others and from their own personal histories” (p. 36). Yin (2018) adds to this definition by noting that a constructivist approach “[attempts] to capture the perspectives of different participants and [focus] on how their different meanings illuminate your topic of study” (p. 16). Therefore, the meaning of a case is found in how the participants and researcher both understand and interpret their understanding of a phenomenon. Ultimately, the researcher is tasked with analyzing how participants' different perspectives and understandings work to explain the nuances of a case.

My study was concerned with the sensemaking of an event by the teachers and their thoughts on their curricular and pedagogical choices and actions within the case. How did they think through designing an inquiry-based unit for their students? What choices did they make about implementing that unit when it centered on a contentious issue? How did the socio-political and socio-economic contexts of the school’s community influence what they included or left out? What challenges did they *predict* they would face and how did those challenges compare to what they *did* face? In what ways did they modify their lessons to better fit their students? In what ways did they mitigate any risk-taking behavior when implementing their curriculum?

In answering any one of these questions, it was impossible to separate out the social and cultural influences on my participant. However, even if I could separate out these influences, I did not want to because I would have lost valuable data in the process. My constructivist approach viewed the complexity of meanings within a case as an asset to the construction of knowledge and meaning.

## **Positionality**

Qualitative research views the researcher as an instrument. Who I am and how I view the world is intimately tied to the generation, analysis, and presentation of this study's data. Therefore, in stating my positionality, I provide context to guide readers in interpreting and analyzing my study and its findings and position myself in the constructivist approach as part of the knowledge-creation process.

Like many other researchers, my interest in this topic stems from my personal experience. I taught for four years in a district where my students were predominately white, middle to low-class, and, despite living in a metro area (USDA Urban Influence Codes, 2020), many identified as rural (Chigbo, 2013). Additionally, I started teaching in August of 2016 and felt the charged nature of U.S. politics impacting my classroom. In my four years as an in-service teacher, I sometimes struggled to teach inquiry and equity-based social studies in ways that engaged my students without enraging them. I can think of many examples of student pushback to lessons on issues like structural racism or American chattel slavery where I felt trapped between teaching what was accurate and what was acceptable. As a straight, white, middle-class, woman raised in the Christian faith, I shared a lot of similarities with my students and enjoyed less resistance in my teaching because of these similarities. However, I still found myself navigating a classroom climate rife with tensions over issues of equity, inclusion, and how we should remember our past. In many ways, this research is for me in that it asks and tries to answer the questions I had as a new teacher. Therefore, my experiences as a teacher and sociopolitical identity cannot be separated from how I designed this study, gathered and interpreted data, and communicated my findings.



## **Guba and Lincoln's Three Questions**

Guba and Lincoln (1994) offer three clarifying questions about an inquiry's ontological, epistemological, and methodological characteristics to understand a paradigm's relationship to an inquiry. In what follows, I walk through each to justify my use.

### **The Ontological Question**

Guba and Lincoln (1994) first ask, "what is the form and nature of reality and... what is there that can be known about?" (p.108). As I approached my study through a constructivist paradigm and was concerned with the relativity of knowledge, especially concerning how the sociopolitical and socioeconomic characteristics of the field site impacted the participant's choices around designing and delivering instruction, I approached the nature of knowledge from a relativist perspective. Specifically, I entered my study with the assumption that there are multiple realities, and that knowledge is created through subjective experience. Guba and Lincoln (1994) define the relativist approach as one in which "realities are apprehendable in the form of multiple, intangible mental constructions, socially and experientially based... and dependent on the form and content on the individual persons... holding the constructions" (pp. 110-111). Therefore, how my participants constructed their reality was based largely on how they experienced their reality. That experience was based largely on contextual factors like their school district's sociopolitical and socioeconomic characteristics.

Approaching my study from this ontological perspective allowed me to privilege the reality of my participant within the event and context of the case identified for study. In turn, my aim was to understand how my participant experienced teaching contentious

social studies in the context of their classroom. It should be noted that this approach to the nature of reality encourages the researcher to seek relative consensus and, to that end, emphasizes “continuous revision” (Guba & Lincoln, 1994, p. 113). Reality, in this case, is more of a conversation than a statement.

### **The Epistemological Question**

Guba and Lincoln’s (1994) second question, “what is the relationship between the knower... and what can be known?” (p. 108), asks about the role of the researcher in the study. My answer to this question is tied to how I answered the previous, therefore, I took the epistemological stance of subjectivity and contended that knowledge is not absolute, nor is it created or interpreted in a vacuum. Rather, knowledge is created through interaction and carries with it the influences of the researcher and the participant. Guba and Lincoln (1994) state that “the investigator and the object of investigation are assumed to be interactively linked so that the ‘findings’ are *literally created* as the investigation proceeds” (p. 111). The influence of this approach on the creation of knowledge within this study is evidenced in my positionality statement and gathering and analysis of data (see corresponding sections for details).

### **The Methodological Question**

Guba and Lincoln’s (1994) final question asks, “how can the inquirer go about finding out whatever he or she believes can be known?” (p. 108). In line with how I answered the previous questions, I took a hermeneutical (interpretive) and dialectical (discourse) approach to my inquiry in the form of a case study. Here, I turn to Merriam (1998) and Yin (2018) to guide my discussion and justify this methodology.

### *Case Study Design*

According to Yin (2018), “case studies are preferred when the relevant behaviors cannot be manipulated and when the desire is to study some contemporary events” (p. 12). This inquiry examined the contemporary event of an in-service teacher designing and delivering an inquiry-based unit that featured questions, tasks, and sources to teach contentious social studies. The purpose was not to manipulate or control the process. Rather, I was interested in gathering information about how two teachers used inquiry-based instruction to navigate the risk of teaching contentious social studies in a Kentucky public high school. Couched within this broader purpose was an interest in understanding how the participants conceptualized teaching contentious issues, the choices they made to minimize and contain the risks associated with teaching contentious issues as they designed a unit, as well as the minute-by-minute choices they made to minimize and contain risk as they delivered a series of lessons. This was not a scenario I created but one that happened regardless of my involvement. Therefore, using a case study methodology lets me observe an authentic event to understand a phenomenon's complexity better.

There are several definitions for a case study methodology. Merriam (1998) notes some distinctions between how methodologists have defined the case study in that Yin (1994) focuses on the process and Stake (1994, 1995) on the unit of study. In the first edition of her book, *Qualitative Research and Case Study Applications in Education*, Merriam (1988) focused on the product. For the purposes of this study, I utilized Yin's 1994 definition of a case study, which he breaks into two parts. First, Yin (2018) addresses the scope of a case study and states that “a case study is an empirical method that: investigates a contemporary phenomenon (the ‘case’) in depth and within its real-

world context, especially when; the boundaries between phenomenon and context may not be clearly evident” (p. 15). Within my study, the phenomenon of interest was the designing and delivering of an inquiry-based series of lessons containing content the teacher identified as contentious within their community. Classrooms have their own ecology and contain a mixture of socioeconomic and sociopolitical characteristics that influence what is taught and how it is taught (Bronfenbrenner, 1992). Within the context of this study, the charged classroom (Pace, 2015), such factors included religious affiliation, historical voting patterns, and racial diversity rates. The presence of these factors reflects Yin’s (2018) notions of a case, real-world context, and phenomenon as well as Stake’s (1995) notion of a “bounded system.” Yin (2018) adds to his definition by addressing the often indistinguishable nature of phenomenon and context by adding,

A case study: copes with the technically distinctive situation in which there will be many more variables of interest than data points, and as one result; benefits from the prior development of theoretical propositions to guide design, data collection, and analysis, and as another result; relies on multiple sources of evidence, with data needing to converge in a triangulating fashion. (p. 15)

The socioeconomic and sociopolitical characteristics of the field site, like community diversity rates and political and religious affiliations (among many others), created a complex system in which I observed participants teach. Additionally, I utilized the theory of inquiry within Swan et al.’s (2018) IDM and its emphasis on questions, tasks, and sources (Swan et al., 2020), and Pace’s (2021) theory of contained risk-taking as my analytical framework. The IDM was my primary framework, with Pace’s work clarifying language around teaching in contentious climates (see Chapter 2 for the framework).

Finally, I gathered data through observations, interviews, and artifacts, which I detail later in this chapter.

***Exploratory Approach.*** I looked to my research question to illuminate the specific methodology I should use in my inquiry and justify my use of an exploratory case study. Yin (2018) offers a shortcut to identifying the categorization of methodology by looking at the beginning of the research question. Yin explains that,

... some types of ‘what’ questions are exploratory... this type of question[s]’ goal [is] to develop ... propositions for further inquiry ... ‘how’ and ‘why’ questions are more explanatory and likely to lead to the use of a case study... because such questions deal with the tracing of operational processes over time, rather than mere frequencies or incidence. (p. 10)

My primary research question concerns *how* an in-service teacher navigates a unique phenomenon, and my secondary questions asks *what* pedagogical choices they make in the process. Although my primary research question starts with a “how” question, in my sub-questions, I go on to clarify that my intention is to study an established topic in a new context. This study situates itself as a beginning to a process of inquiry, rather than an ending and will not provide conclusive answers. Therefore, based on these considerations, an exploratory case study fits my inquiry goals.

***Single-case, Holistic Design.*** Yin (2018) notes two approaches to case study design: single- and multiple-case study designs. My study examined two Kentucky secondary social studies teachers as they designed and delivered inquiry-based instruction featuring contentious social studies. I observed two teachers within the same school to

see a wider variety of classroom contexts. Within his explanation of the single case, Yin (2018) offers five circumstantial reasons for selecting a single-case design as “critical, unusual, common, revelatory, or longitudinal” (p. 49). My study falls into the category of a common single-case study as Yin (2018) identifies the rationale for a single case as “... the objective... is to capture the circumstances and conditions of an everyday situation” (p. 50). In selecting my research site and participants, I recruited two teachers—one early career and the other mid-career—whose teaching context represented a typical case of teaching social studies in a non-urban Kentucky public high school. Selecting a common case allowed me to generalize findings to similar contexts. Although I certainly could have included more cases in my design, I was more interested in deeply investigating the practical application of theory within one context.

Yin (2018), within his discussion of case study research designs, presents the distinction between a holistic and embedded single-case study. A holistic design analyzes the entire phenomenon, whereas an embedded design separates out units of analysis. My study utilized a holistic design as the designing and delivering of instruction are interwoven. The teachers I observed made design choices about their curriculum as they delivered their instruction in response to their students. Therefore, separating the designing and delivery of inquiry-based instruction featuring contentious social would be impractical. Using a holistic design allowed me to understand how the teachers adapted and modified instruction throughout the two weeks I observed.

### **Research Design**

The present exploratory case study was designed with Yin’s (2018) notion of a case in mind. Specifically, the “distinctive situation” that warrants “multiple sources of

evidence” (p. 15). My research design that follows, seeks to capture the many distinctive elements of the case and provide the opportunity for triangulation. In the following section, I discuss the site selection, participants, phases of research, and data generation and analysis, in addition to the limitations of my design. My intent was to capture the complex factors at play in implementing instruction over a two-week period that featured content the teachers identified as contentious in their community.

### **Site Selection**

My site selection was influenced by Washington and Humphries's 2011 research design, as the community context of the study was central to the findings. Specifically, I was interested in a field site where community members' and teachers' sense-making of social studies content as open or closed to deliberation differed. In her 2015 book, Pace defines this as a charged classroom, saying that a charged classroom is one where “the tensions of public-school teaching and their interaction with contemporary issues are played out” (Pace, 2015, p. 4). She later studied charged classrooms in 2019, where she examined how “teacher educators’ approaches [were] shaped by contextual factors such as cultural and sociopolitical climates” (p. 229). Like Pace, I was interested in how contextual factors influenced teachers’ approaches to contentious social studies. I saw the charged classroom as the needed context to observe how such factors influenced teacher choices around curriculum and instruction. Therefore, I selected a field site representing a charged classroom within a community where there was disagreement over the open or closed nature of certain issues to deliberation.

In the state of Kentucky, with its social studies standards based on the C3 Framework and the passage of Senate Bill 1, tensions were high across the state around

social studies curriculum and instruction. In selecting my site, I looked at Kentucky public schools in semi-rural areas, as those contexts had the highest probability of tension between community members and teachers over social studies curriculum and instruction. From there, the site selection was then constrained to sites that were practically accessible in terms of travel times to the field site. Therefore, I limited my recruitment to traditional public high schools within a 20-mile radius of my university to maximize the time I would spend observing the classroom during the observation phase of my study. This limited my potential field sites to twelve schools. I further refined my list of potential field sites by eliminating schools where I had personal ties to the social studies department, which reduced my list to three. From there, I networked with social studies teachers and administrators at professional development trainings on the IDM. At one such training, I met an early career teacher, Ms. Simpson, from one of the three schools I identified as potential field sites. She shared with me that she taught freshman government and world civilization and was interested in further incorporating the IDM into her instructional practice as her mentor teacher encouraged her to continue integrating inquiry-based pedagogy into her teaching. After the professional development, I contacted Ms. Simpson and her mentor teacher, Mr. Morelli, and asked them to participate in the study. They both agreed, making Washington Community High School my field site.

### ***Field Site***

Washington Community High School (WCHS) is a county high school outside the second largest city in Kentucky. According to the 2020 Census, Washington County has a population of 20,000 and has two school districts: Washington County Public



Schools and Milford Independent Schools. Ms. Simpson noted that the community is “very segregated. We have city schools, and we don't have African American students at our school, really and truly.” WCHS is a Title 1 public high school that serves 800 students. According to the school’s enrollment data, the student population is 77.6% white, 15% Hispanic, 4.2% Black, and 2.2% other; and over half (56.8%) of the student population is categorized as “economically disadvantaged,” (School Report Card, 2019). In the independent school district, Milford High School is also a Title 1 school and serves 222 students. According to the school’s enrollment data, the student population is 52.7% white, 22.5% Black, 13.5% Hispanic, and 11.3% other; and 68.5% of the school population is categorized as “economically disadvantaged,” (School Report Card, 2019). WCHS represents a typical case in the state of Kentucky as it closely mirrors the demographic breakdown of students state-wide (Kentucky Department of Education, 2022).

### ***Community***

The sociopolitical factors of Washington County impacted my site selection as well as my research focused on how a place's characteristics impact social studies curriculum and instruction. The community the high school serves is predominantly white (84.3% according to the 2020 Census), and in the 2020 Presidential Election, 64.2% of voters voted for the Republican candidate, Donald Trump (Politico, 2021). Additionally, 76% of Kentuckians identify as Christian, and, while there was no county data on the exact percentage of community members in Washington County who identify as Christian, the more than thirty churches that exist in the county seat alone suggest this number is indicative of Washington County’s religious affiliation.

## **Access**

In the late summer of 2022, I contacted the principal of WCHS, the district's central office, and the potential teacher participants to begin securing permission to observe in WCHS classrooms. In addition to observing in classrooms, I initially requested permission to audio-record the classes to verify my field notes. However, while I was granted permission to observe classes and collect student work, I was not granted permission to audio-record due to confidentiality concerns for students, whose voices would be captured in the recordings. After conversations with my university's ethical review board, the Director of Federal Programs at the school district's central office, the principal of WCHS, and the teachers identified as potential participants in the research design, I crafted a methodology considering the ethics and constraints of the field site. From there, I obtained signed letters of consent from the teachers and a letter of support from the school signed by the principal.

## **Participant Selection**

Participant selection was very important to my case study methodology as the participants are vital to understanding the phenomenon of interest. Merriam (1998) notes that participants help researchers “discover, understand, and gain insight” about what can be learned “and therefore [researchers] must select a sample from which the most can be learned” (p. 61). Therefore, as noted in my site selection, I conducted a “purposeful sample” (Patton, 1990) by recruiting participants that fit my research aims. I was particularly interested in recruiting teachers who already used inquiry-based teaching methods and were familiar with the theory of inquiry within the IDM. Additionally, I was interested in recruiting teachers who self-identified as experiencing tension when

teaching inquiry and equity-based social studies. After meeting Ms. Simpson at the professional development and exchanging emails with her and Mr. Morelli, I determined that these two teachers met the requirements to participate in the study.

### ***Participants***

***Ms. Simpson.*** Ms. Simpson was in her first year teaching social studies at WCHS. Although it was her first year in social studies, she had taught science the year before with an emergency certification. During her certification process, she completed her student-teaching under Mr. Morelli at the school. Hence, she was very familiar with the school. Before landing at WCHS, Ms. Simpson graduated with a secondary social studies education degree from a regional university's teaching program in 2021. Her program exposed her to the KASSS, but not the C3 Framework or IDM. Her time student teaching under Mr. Morelli was when she was introduced to inquiry-based learning. In the summer of 2022, she began attending a professional development workshop on the IDM that met again later in the fall. There, she learned how to apply the model to curriculum design and worked on developing curriculum based on the IDM. Due to her newness to the field, while familiar with inquiry-based education and the IDM, she was still mastering her craft as a teacher and frequently reflected on how she might better hone her practice.

Ms. Simpson was born in Washington County and had strong ties to the community. Her family lived in Washington County until she was in kindergarten before they moved to a larger city in central Kentucky, where Ms. Simpson attended Kindergarten through 12<sup>th</sup> grade. After she graduated high school, her parents moved their family back to Washington County, where Ms. Simpson's younger siblings attended

school. During the 2022-2023 school year, one of Ms. Simpson's siblings was a student at WCHS. Ms. Simpson identifies as politically liberal but is aware of not inserting her partisanship beliefs into her teaching. Her approach to teaching social studies is to ground her instruction in primary sources and expose students to new perspectives they may not have encountered before seeing them in her class. She saw her work as preparing students for engagement in society outside of the classroom.

**Mr. Morelli.** Mr. Morelli was in his seventh-year teaching and was the head of the social studies department at WCHS, where he had taught for four years. He attended college in the State University of New York system, where he first got an undergraduate degree in History, and later a master's in teaching. His graduate work was under one of the writers of the IDM and focused exclusively on the C3 Framework and inquiry-based curriculum and instruction. He was very familiar with the IDM and had much experience implementing it in his student teaching placement. In reflecting on his use of the IDM, he noted that his implementation has changed over time. He described his current approach to inquiry-based curriculum and instruction as driven primarily by including primary sources and analytical questions. His teaching philosophy centered on creating analytical thinkers. As the department head, Mr. Morelli played a significant role in mentoring social studies teachers within his department and worked closely with Ms. Simpson, sharing a common planning hour, to plan and implement lessons.

Mr. Morelli grew up in the rural Northeast, which he described as very conservative and homogenous. Throughout the pre- and post-observation interviews, he noted how much more diverse Washington County was than where he grew up. Although he was raised in a conservative household, he shared that he is politically liberal now.

Like Ms. Simpson, Mr. Morelli was cognizant of not letting his teaching be partisan and was aware of community beliefs and ideologies that differed from his own. Mr. Morelli lives with his wife in a larger city in central Kentucky. They relocated to Kentucky so his wife could work in the horse industry.

### **Phases of Inquiry**

This exploratory case study followed three phases of inquiry organized around the phases of curriculum design: design, deliver, and debrief. The first phase looked at the teachers' choices as they designed curriculum, both at the course level and for the two weeks of instruction I observed. Data collection during this phase consisted of a formal semi-structured interview with each teacher and the collection of instructional artifacts in the form of course maps and potential lesson materials. The second phase focused on the teachers' choices as they implemented two weeks of lessons that featured contentious social studies using inquiry-based learning. The teachers selected the classes, class sections, and two-week period of instruction they wanted me to observe based on their perception of the content as contentious. It was important that the teachers identified the lesson content as contentious, rather than me identifying contentious social studies, as the definition of contentious social studies emphasizes how the community and the teachers view the issue or topic. As the teachers knew the community and their students best, they could identify social studies content that they felt was contentious better than I as a community outsider (Table 6). Data collection during this phase consisted of classroom observations, in which I took field notes; conducted informal interviews with the teachers before, during, and after their instruction; and the collection of instructional artifacts in the form of lesson worksheets, primary sources, and PowerPoint instructions.

	Social Studies Content	Why the teachers considered it to be contentious
Mr. Morelli	The American Civil War and Reconstruction	Mr. Morelli identified this content as contentious because of differing views about the legacy of the Civil War and the Confederacy. Additionally, he saw the failure of Reconstruction as leading to modern systemic inequities and worried that community members might see this viewpoint as promoting Critical Race Theory.
Ms. Simpson	The interwar years in 20 <sup>th</sup> Century Europe	Ms. Simpson identified this content as contentious because of the similarities she saw between the interwar years in Germany and modern American politics during the Trump presidency. Additionally, she worried about xenophobic ideologies in the community impacting how students talked about antisemitism in Europe in the 20 <sup>th</sup> century.

Table 6 | Teacher’s identification of contentious social studies

The final phase focused on how the teachers reflected on their instructional choices after two weeks of lessons featuring contentious social studies using inquiry-based instruction. Data collection during this phase consisted of formal, semi-structured interviews with each participant and the collection of instructional artifacts in the form of deidentified student work.

### Data Sources

Data sources for this inquiry were based on Yin’s (2009) identification of case study data sources and an examination of similar case studies on social studies curriculum and instruction (Crowley, 2016; Engebretson, 2018; Moffa, 2020; Pace, 2019; Washington & Humphries, 2011). Data sources included transcriptions of formal semi-structured interviews with each teacher, field notes from classroom observations, written reflections and comments from the teachers on the field notes, notes from informal

interviews during classroom observations, and instructional artifacts including curriculum maps, student handouts, lesson resources, primary sources, lesson instructions, and deidentified student work. See Table 7 for an analysis of each data source's strengths and weaknesses.

<b>Data Source</b>	<b>Relevant Strengths and Weaknesses (Yin, 2018, p. 102)</b>	<b>Application to research design</b>
Observations	<p>Immediate: Covers action in real time</p> <p>Contextual: Can cover the case's context</p> <p>Reflexivity: Actions may proceed differently because participants know they are being observed</p>	<p>Observations allowed me to authentically experience the phenomenon in real-time. I was aware of how my presence impacted the participants being observed and the classroom dynamic.</p>
Interviews	<p>Targeted: Can focus directly on case study topics</p> <p>Insightful: Provides explanations as well as personal views</p> <p>Reflexivity: Interviewee says what researcher wants to hear</p> <p>Inaccuracy: Potential for poor design to impact quality and validity</p>	<p>The interviews allowed me to capture specific information with attention paid to explanation and personal experience and reflection.</p> <p>Informal interviews during phase two of the study allowed me to capture the participants' rationales for instructional choices and will capture metacognition about instructional delivery.</p>
Physical Artifacts	<p>Insightful into cultural features and technical operations</p>	<p>Artifacts will allow me to understand the technical aspects of the inquiry-based lesson design and implementation process.</p>

Table 7 | Data Source Analysis

The pre-observation formal, semi-structured interview focused on the teachers' backgrounds, their teaching experience—including their experience with inquiry-based

social studies instruction and community pushback—and their plans for the upcoming two weeks of lessons they identified as containing contentious social studies. Classroom observations focused specifically on the teachers and how they delivered their instruction, and field notes specifically recorded what the teachers said and how they supported students during instruction. During my time in the classroom, I conducted informal interviews with the teachers before, during, and after their lessons and recorded notes about these interviews in my field notes. These informal interviews sometimes happened after I asked the teachers a question about their instruction, but more often happened when the teachers themselves came to me and offered insight and clarification about their instructional choices for the students and lessons I was observing. Instructional artifacts collected during this phase supported the analysis of the teachers’ choices around the implementation of their lessons by providing context and details about their choices. The data sources from this phase were assembled to create a detailed account of the classes I observed. This account was made more detailed through the member-checking process, as the teachers noted on the field notes moments they thought were important regarding the choices they made teaching contentious social studies. Additionally, they commented on the field notes document with clarifications and explanations of their thoughts leading up to their decisions to contain the risk as they taught. Finally, after observing the teachers’ classes, I collected deidentified student work to complete the account of the classes I observed. The deidentified student work was used to fill in the gaps around student response to the teachers’ instructional choices, as the field notes did not capture all the comments students made during discussions considering many discussions were with small groups of students and happened simultaneously making it impossible to



discern what each student was saying. Much of the class discussions were based on work students had already written down, so collecting this work gave a relatively accurate account of what students discussed in their small groups. The final stage of data collection was post-observation semi-structured interviews with each teacher. These interviews focused on clarifications of instructional moments, discussion of the teachers' perception of the contention in their classrooms and community, and questions about the teachers' choices to take or contain risks in their lessons.

### Case Study Quality

The research design attended to the generation of credible data. Yin (2009) describes four ways to test for case study quality: construct validity, internal validity, external validity, and reliability. See Table 8 for how my research design meets Yin's quality tests.

Tests	Case Study Tactic	Present Case Study
Construct Validity	Multiple sources of evidence	Multiple sources of evidence included interviews, observations, and instructional artifacts.
	Chain of evidence	I established a chain of evidence and maintained it during all phases of data collection and analysis. My research questions followed a chain of evidence to my conclusions.
	Member check	I asked participants to member check my field notes for accuracy and shared my interpretation of events during classroom observations. The participants agreed with the information captured in the fieldnotes and agreed with my interpretation of events during classroom observations.

Table 8 | Case study quality tests (Yin, 2009, p. 41)

Internal Validity	Pattern matching	Throughout data analysis, I considered the variables that contributed to the teachers' instructional choices. The variables followed predicted patterns.
	Explanation building	Throughout my findings chapter, I examine the causal links between variables and the teachers' instructional choices.
	Rival explanations	Throughout my findings chapter, I address rival explanations in the form of null hypotheses for participant's choices about teaching contentious social studies.
	Logic models	Similar to pattern matching, I considered the cause and effect relationship of the variables.
External Validity	Theory	I used Swan, Grant, and Lee's (2018) theory of inquiry within the IDM and its emphasis on questions, tasks, and sources and Pace's (2019) framework for teaching controversial issues to test the generalizability of my study to other theories.
	Replication	While not inherently relevant to my single-case study, comprising my case of two teachers produced similar effect in that I could determine how the analytical framework spoke to two separate teachers.
Reliability	Case study protocol	I used a detail case study protocol to guide the inquiry.
	Case study database	I created a case study data base organized for outside reviewers.

Table 8 (continued) | Case study quality tests (Yin, 2009, p. 41)

Regarding Yin's emphasis on a case study database (Yin, 2018), I organized my data into an accessible case study database. Establishing a database allows outside reviewers to evaluate the accuracy of my findings. My case study database comprised interview protocols, interview transcripts and notes, field notes from classroom observations, instructional materials, and deidentified student work.

## Data Analysis

I analyzed the data through an iterative process, which began during data collection. I kept a research journal during my data collection phase of the study and wrote analytical memos after each interview and classroom observation. Additionally, I coded interviews directly after receiving the transcriptions back from the third-party service I used and coded classroom observations immediately after observing each teacher's two weeks of lessons. I did not code classroom observations each day as I wanted to ensure the field notes were not swayed by the coding I did on the previous lesson's notes.

I used Corbin and Strauss's (2014) constant comparative method using a reflexive thematic approach (Terry & Hayfield, 2021) to conduct line-by-line coding and theme generation. Terry and Hayfield (2021) break down the phases of *reflexive thematic analysis* into six phases,

- 1) A thorough and ongoing *familiarization* with the data set;
- 2) An open-ended *coding* process not constrained by concerns about agreement between coders, nor by delimiting and defining codes;
- 3) *Initial theme generation* of tentative prototype themes from codes;
- 4) *Developing and reviewing* and testing those prototype themes against the data and developing them as needed, which will potentially involve a process of deconstruction and rebuilding new themes;
- 5) *Defining and naming* final themes, which serves as the basis for;
- 6) *Writing up* the report. (pp. 9-10)

I followed these phases in my analysis as I worked toward theme generation. Integral to each analysis phase was my analytical framework, consisting of Swan, Grant, and Lee's

(2018) theory of inquiry within the IDM and its emphasis on questions, tasks, and sources and Pace's (2019) framework for teaching controversial issues. At each step in the process, I held my data up against the framework to determine how the data spoke to the analytical framework and how the framework illuminated the data.

### **Limitations**

Case studies are often recognized as lacking rigor and generalizability (Yin, 2009). However, attention was paid to case study quality (Table 8) to increase this study's rigor. The case study methodology was chosen for this study because it aligned with its purpose: to explain a unique phenomenon using an analytical framework. Therefore, generalizability is not the purpose of this study and should not be seen as a limitation. This single-case study only explores two teachers' choices around curriculum and instruction during two weeks of instruction in three separate classes. Hence, the results are not necessarily generalizable beyond that scope. This narrow scope was partly due to outside factors beyond my control, like time constraints and limited access due to district-level hesitation around the research topic. The present study does not offer a manual for teaching contentious social studies in charged spaces using inquiry-based practices. However, focusing intimately on two teachers allowed for better data management and a deeper analysis of the phenomenon of interest: teachers' use of inquiry-based curriculum and instruction to contain risk when teaching contentious social studies.

### **Conclusion**

This explanatory case study focused on two in-service secondary Kentucky social studies teachers as they designed and delivered an inquiry-based unit on contentious

social studies. I situated my study in the constructivist paradigm, utilized a relativist approach, and acknowledged my role as an instrument in the generation and analysis of data. The theory of inquiry, as operationalized in Swan et al.'s (2018) IDM and its emphasis on questions, tasks, and sources (Swan et al., 2020) along with Pace's framework for teaching controversial issues (2021), informed this study and provided the analytical framework by which I analyzed the data. Data included formal semi-structured interviews, informal interviews, classroom observations, and curriculum artifacts. I used a thematic approach to data analysis, constantly analyzing the data to identify patterns and codes to develop broader themes to draw my claims. I aimed to understand better how teachers navigated the challenges of teaching contentious issues during charged times using inquiry-based curriculum. My greater goal was to learn from the present case to prepare pre-service teachers and support in-service teachers better as they teach in charged classrooms.

## Chapter 4

### Findings

This qualitative case study used an embedded, single case of two high school teachers teaching contentious social studies in a high school in a semi-rural Kentucky school district. The purpose was to examine the two teachers' curricular choices as they designed and delivered an inquiry-based unit featuring contentious social studies. Chapter 2 defines inquiry-based learning using Swan et al.'s (2016) IDM and focuses on questions, tasks, and sources. Additionally, as defined in Chapter 2, contentious social studies is social studies that feature content where there is a disagreement between educators and community members over its status as open or closed to deliberation.

This study examined how two teachers navigated teaching contentious social studies in their charged classrooms using an inquiry-based approach. The main research question was: How do two in-service secondary teachers use inquiry-based instruction to navigate teaching contentious social studies during charged times? Supporting research questions included: (1) What curricular and pedagogical choices were made by the in-service teachers to navigate risk when *designing* inquiry-based instruction that features contentious social studies during charged times? (2) What curricular and pedagogical choices were made by the in-service teachers to navigate risk when *delivering* inquiry-based instruction that features contentious social studies during charged times?

I applied ongoing thematic analysis to the case study data and constantly considered my analytical framework and other explanations. In this chapter, I present the results of my data analysis. The findings are grouped into five findings encompassing data from formal and informal interviews, classroom observations, and instructional

artifacts. The first claim addresses how the teachers engaged with the community to minimize the risk and reframe how they taught contentious social studies to create a positive learning environment. The next three claims address the teachers' choices to exert more control over the inquiry process to contain the risk of teaching contentious social studies. The final claim addresses the teachers' choices to distance themselves from riskier curriculum choices. The findings are as follows:

1. The learning environment drove student engagement with the inquiry-based lessons featuring contentious social studies.
2. The teachers opted for smaller question, task, and source sequences rather than full inquiries containing all the IDM components.
3. The teachers slowed the progression through questions, tasks, and sources to better control the inquiry process.
4. The teachers privileged safety over openness in their inquiry-based lessons featuring contentious social studies.
5. The teachers distanced themselves from contentious social studies through their instructional choices.

### **The Teachers Relied on the Learning Environment**

Mr. Morelli and Ms. Simpson's cultivation of the learning environment was integral to their choices around designing and delivering their curriculum. Additionally, their choices around the learning environment heavily considered the larger community their school served. The teachers' choices to take risks around teaching contentious social studies were made primarily in response to the threat of community, rather than student, pushback. Mr. Morelli and Ms. Simpson knew that the community purported and held

problematic beliefs around race and ethnicity and saw their job as disrupting those problematic beliefs by exposing students to counternarratives in their lessons. Additionally, while they called out and pushed back against the inequity they saw in Washington County, they still held a strong positive regard for the community. This attitude helped the teachers continue to take risks and expose students to new perspectives because it gave them hope that their work could change students' worldviews.

### **Instructional Choices made with the Community in Mind**

How the teachers imagined community members reacting to their instruction significantly influenced Mr. Morelli and Ms. Simpson's choices regarding implementing inquiry-based instruction featuring contentious social studies. The classroom environment consisted of a triad of actors: the teacher, the students, and the community. Choices to contain risk were primarily made with the community in mind rather than students because the teachers feared some community members' pushback if they countered accepted historical narratives. Ms. Simpson, who grew up in Washington County, shared that the town and county the school serves "is blatantly racist." Mr. Morelli, a community outsider, was less blunt, saying that they have "a pretty good community... but can be kind of rambunctious towards teachers sometimes." Rather than basing their instructional choices solely on student interests and need, the teachers found themselves making choices around the design and delivery of their instruction based on fear of community pushback.

Mr. Morelli has had parents from the community push back on his instruction in previous years, which impacted how he approached the unit I observed him teach. Mr.



Morelli shared that “parents will call very quickly in this community if anything comes up.” He noted that there have been times in his teaching career when he has had to be careful in what he says and does in class “not because of what was right and wrong ethically for a teacher, but because how I knew the community would respond if I went one way or another.” For example, he used to have students watch ten minutes of a news show for high school students produced by CNN, but he said it became too contentious during the impeachment trials of Donald Trump. He also shared that after the January 6<sup>th</sup> Insurrection, he was advised by his principal not to talk about it in class at a staff meeting where the principal said, “if it's not in your standard, it shouldn't be discussed.” He shared that he “was just like, okay. Well, I don't care because I'm going to talk; this is just a major moment. They tried to overthrow the government.” Notably, Mr. Morelli did talk about the insurrection and did receive a phone call from a parent complaining about how he talked about the Confederate flag. These experiences shaped Mr. Morelli's comfort level in taking risks when teaching about Reconstruction and its failure. He considered how the community would react with every choice he made to engage in contentious social studies, both in designing and delivering his instruction.

Ms. Simpson, as a first-year teacher, had less experience with community pushback as a teacher. However, coming from Washington County, she knew how the community might react to her teaching when she taught contentious social studies based on her experience living there. Her knowledge of the community and status as an insider meant she felt she could take more calculated risks in certain situations, sharing that, “there are some kids that I don't care, and I will tell you, *No, you're being racist. Stop.*”

Still, she also felt she was more heavily watched because community members knew who she was. She shared,

Yeah, I would say that as far as rapport and relationships go, it helps. I'm like, "Oh, I've known you since you were born. I shared a crib with your older sister." That helps with rapport and relationships. The problem is that I know most of these people's political views, and most of them are besties with superintendent Ms. Smith, who is very politically driven. You don't say or do the wrong thing in Washington County, you just don't. If you do, you're not going to have a job.

While she felt comfortable calling out racist and xenophobic comments as they came up in class with students she knew, she still hesitated to design instruction that explicitly called out xenophobia in modern America. Ms. Simpson said that being from the community made it hard for her to take risks in teaching contentious social studies because,

... they can call me out by name and say, "Alexis Simpson, daughter of Brenda and Steve Simpson, who knows this family and this family," and, "Oh, she's neighbors, or her parents are neighbors to X, Y, and Z." Then I've got family members running for county commission and stuff like that. It definitely influences the way that you're willing to express and be very plain [with what you teach].

For her, being from the community in which she taught was a blessing and a curse. The fact that she was a community insider meant that she was familiar with students and their families in a way that emboldened her to engage with students she knew outside of

school and pushback when they said something problematic. However, she was still very careful about what she said to the whole class because she was afraid of students reporting what she said back to community members who might complain to the superintendent.

### **Strong Positive Regard with Accountability**

While the teachers disagreed with the racist viewpoints of some community members, they still generally held a strong positive regard for the community. Looking favorably at the community was an important factor in how they ran their classrooms because it allowed them to hope their work in the classroom might lead to change within the community. So, while Mr. Morelli and Ms. Simpson viewed the community positively, they were still critical of how it perpetuated inequities and upheld racist ideologies. They still felt it was important to interrogate the community and work towards making it more just and equitable.

The biggest force behind Mr. Morelli and Ms. Simpson's positive regard for the community was how similar their backgrounds were to their students. They, like their students, grew up in semi-rural towns with limited exposure to multiple perspectives and challenging narratives. Therefore, they remembered how their worldviews were limited because of where they grew up. Mr. Morelli shared,

I grew up in a very rural conservative town in the northeast.... So it's very rural, very white, not really diverse by any means. So that in itself, you can kind of probably guess the type of environment it was as far as political stances and whatnot. It was very conservative and whatnot.

Growing up in a similar environment helped Mr. Morelli understand his students' backgrounds and know how his work in the classroom might impact his students. Ms. Simpson was born in Washington County and spent her early childhood there. And while she went to school in the city nearby, her siblings now attend Washington County schools. She knows that Washington County has many flaws, but she also genuinely cares about and is invested in the community, saying that,

Washington County is a very tightly knit community. You don't really go to Walmart without the other end of town hearing about it, which is scary. But also, it is reassuring when terrible things happen, and it's a giant family. And I think that's what I like most about working in Washington County is I know all these kids. I've known them their whole lives and when something happens, we all rally behind one another. And I think that's a good thing.

Ms. Simpson saw the good and bad in the community and was able to understand that both were true. To her, Washington County could be a caring community, and it could also be racist. Like Mr. Morelli, she saw her job as acknowledging the good while calling out and confronting the bad.

The parallels between Washington County and where Mr. Morelli grew up in the northeast as well as Ms. Simpson's history with Washington County made them approach students with compassion. The teachers hoped that exposing their students to perspectives that challenged the problematic ones they grew up with would catalyze change, even if that exposure was more subversive because of perceived risk. Mr. Morelli shared that he is "less judgmental towards students who I might see their political beliefs are kind of strayed with more misinformation and whatnot." He views his students as products of

where they live, something he knows they have little control over as minors. What students are exposed to at home and in their community shapes how they view and engage with the world. He sees his role as disrupting the misinformation in his classroom,

I'm more gentle towards them to try and guide them towards better thinking and better ways of thinking about information that's accurate... Because even myself growing up, I had parents that were super conservative that believed in things that I would read in history class that I was like, "wait a second, that doesn't line up here." And my teachers were always very good at just guiding you towards the information and allowing you to develop an autonomy with it that crafted your thinking. So, I see it with my students where I'm just like, okay, I'm going to hopefully channel them to be thinking, not that I'm trying to get them to think a certain way politically, but try and get them to think about history in the correct way. Because especially in the last five years, we've seen history become very politicized by certain groups.

Mr. Morelli understands why some students come into the classroom with the beliefs they have, and he makes choices around how he designs and delivers his curriculum to put new narratives in front of those students.

### **An Important Reframing**

An important component to Mr. Morelli and Ms. Simpson's attitudes is that, while they acknowledged the role of modern partisan politics in creating some of the problematic ideologies they see in their classes, they do not view students along partisan lines. Instead, they thought of students as open- or closed-minded, which they thought was something they could change if they exposed them to more perspectives. Both

teachers were careful in their interviews to make this distinction. When Mr. Morelli reflected on how his teachers growing up impacted how he approached teaching contentious social studies, he shared,

... when they interacted with the kids and the kids' reluctance to see how history has affected modern day, you could see the conservative values in the community. Maybe I shouldn't say conservative because I don't want to pinpoint people who are conservative if I say they think this way, but the kids were less open to understanding how history has affected modern socioeconomic issues.

For Mr. Morelli, in his practice, it was more about students being open-minded or closed-minded, rather than liberal or conservative. Likewise, Ms. Simpson talked about students being, “very close-minded,” and said that she wants, “to expose them to more mindsets and actual real-life scenarios.” She blames this close-mindedness on where the students are from and the limited things they have been exposed to. She shared that,

[They] are not cultured at all, and [they've] never really been exposed to anything. I do think that's part of my job. I don't want them to go through this narrative thinking that the United States is ... I feel like that's a part of even our political climate now, is America's so awesome and we're the best. No, we're actually not. We've done horrific things as well. Not that you have to be humiliated from where you are, or disgusted to live in the United States, but I do think it's important that they understand the actual history of their nation.

Viewing students in this way—as open- or closed-minded rather than Republican or Democrat or Conservative or Liberal—broke the conversation away from static labels

into an emphasis on exposure, which could be changed. Additionally, it changed the classroom dynamic from oppositional to collaborative as the teachers were not trying to change students' minds but instead show them more things. The emphasis on helping closed-minded students become more open-minded reframed the classroom environment from challenging community values to gaining more information about the past and present. Ultimately, this created a classroom environment in which Mr. Morelli and Ms. Simpson were able to take risks and students were able to encounter new perspectives and ideas.

### **Summary**

Cultivating a learning environment conducive to exposing students to new ideas was important to the success of inquiry-based learning, especially when Mr. Morelli and Ms. Simpson taught contentious social studies. The learning environment was tightly connected to the broader community as the teachers made curricular decisions about implementing contentious social studies based on potential community, rather than student, pushback. Mr. Morelli and Ms. Simpson were aware of potential community pushback because they knew some community members held racist and xenophobic beliefs from their experiences with the community. The teachers reported that they sought to call out and counter these problematic beliefs in their instruction by exposing students to new perspectives. They found that holding a positive regard for the community enabled them to continue engaging in teaching that challenged community beliefs.

### **The Teachers Chose Smaller Units of Inquiry**

My original intent in this study was to observe the participants as they taught a full inquiry designed with the IDM. However, when implementing their lessons, the teachers focused on smaller inquiry-based learning units in the form of questions, tasks, and sources that culminated in argumentation (Tables 1 and 2). Mr. Morelli shared that he thinks effective inquiry-based instruction does not have to include all parts of the IDM and that “getting a group of documents together with good open-ended questions... is one of the most effective ways” to do inquiry. Ms. Simpson talked about her hope that her teaching incorporates inquiry every day, even if it’s “not through large elaborate things.” To Mr. Morelli and Ms. Simpson, the theory of inquiry guided their choices about what they emphasized in their classrooms. However, it was not confined to a rigid definition or sequence of instruction. Luckily, the IDM is flexible and allows space for multiple expressions of inquiry-based learning. Therefore, their commitment to centering primary sources in their lessons and engaging students in analytical thinking resulted in a form of inquiry-based learning despite not strictly adhering to the IDM.

In this section, I will discuss how the teachers’ choices to use smaller units of inquiry helped them feel more in control of the perceived riskier aspects of their lessons. Regarding the units I observed, the teachers’ implementation of smaller inquiry-based instructional sequences rather than full-blown inquiries aided them as they navigated teaching contentious social studies (in their cases, America’s Reconstruction period and the rise of Hitler in a post-World War I Europe). The teachers focused their lessons on formative questions, tasks, and sources that culminated in an argument and did not include any connections to modern issues in the formative work or any staging activities,



summative argument extensions, or taking informed action sequences. These model components represented too much of a risk for them when giving instruction around content they identified as contentious because they overtly drew out the contention. However, it is also important to acknowledge that this choice to engage in smaller units of inquiry was not made exclusively to contain risk while teaching a contentious issue. Rather, it also stemmed from real and perceived practical constraints on their practice, like the time they had to complete the unit and their familiarity with the IDM as implemented in the classroom context. For these teachers, smaller units of inquiry felt more manageable in their demanding environment.

Mr. Morelli				
Day 1	Day 2	Day 3	Day 4	Day 5
Introduced the question, “To what extent do Lincoln’s ideas about slavery change over time?”  Began source analysis in small and whole groups.	Students write an argument based on the sources and work in small groups to workshop their arguments.	Whole class discussion reviewed the documents and grouped the documents into ones that showed change and ones that showed continuity.	Whole group discussion about the role of slavery in the Civil War.	Students wrote essays addressing the prompt, “Evaluate the extent to which Lincoln’s ideas about slavery changed over time.”

Table 9 | Mr. Morelli’s lesson progression

Day 6	Day 7	Day 8	Day 9	Day 10
Introduced the question, "To what extent did Reconstruction change the United States?" Students analyzed the first two sources in small groups and whole-group discussions.	Students wrote an argument addressing the deliberative question using the first two sources. Students analyzed the next two sources in small groups and whole-group discussion.	Students were divided into small groups and assigned one of the remaining sources to analyze. Students shared out their analysis with the whole class. The spent the remainder of class sorting documents into ones that showed change and ones that showed continuity.	Students spent time outlining their argument in response to the deliberative question.	Students wrote essays addressing the prompt, "Evaluate the extent to which Reconstruction changed the United States between 1865 and 1900."

Table 9 (continued) | Mr. Morelli's lesson progression

Ms. Simpson				
Day 1	Day 2	Day 3	Day 4	Day 5
Introduced the question, "How did the Treaty of Versailles help cause World War II?" by having students read a background essay and analyze a political cartoon.	Broke down the question, "How did the Treaty of Versailles help cause World War II?" and told students each document was about a cause. Students analyzed the documents first on their own and then as a class.	Students outlined their analytical essay after receiving instructions on how to organize their essays. Ms. Simpson provided feedback in real-time on draft outlines.	Students started writing their analytical essays on Google Docs and Ms. Simpson gave them feedback as they wrote.	Students continued writing their analytical essays on Google Docs with Ms. Simpson giving feedback as they wrote.

Table 10 | Ms. Simpson's lesson progression

Day 6	Day 7	Day 8	Day 9	Day 10
No school. Students finished essays as homework.	Began teaching about the rise of Hitler and introduced the question, “How did the end of World War I impact Germany?” Students read a background essay and began analyzing documents.	Continued to analyze documents. Students analyzed documents first on their own and then as a class.	Continued to analyze documents. Students sorted documents into three categories around how Hitler gained, consolidated, or maintained power. Students completed the sorting on their own, and then reviewed as a class.	Students finished sorting documents and completed a quiz based on the documents.

Table 10 (continued) | Ms. Simpson’s lesson progression

### **The Core of Inquiry-based Learning**

Teachers stuck to the core of an inquiry designed with the IDM but removed the model’s perceived riskier elements from their implementation. Mr. Morelli did not stage the question, extend the summative task, or take informed action and Ms. Wallace did not extend the summative task or take informed action. Ms. Simpson shared that being untenured impacted her choice not to connect her content to modern patterns through extending the summative task or a taking informed action sequence, saying, “I think maybe if I was more comfortable with my content and maybe having a job that I would [make those connections] ... I'm scared to make those parallels at times because I don't want them to be like, ‘She's equating.’” Likewise, Mr. Morelli also stopped himself before venturing too far into territory he thought was too risky. He shared that when he was talking “about the continuity of discrimination because of the failures of

Reconstruction... I got a little nervous.” Clarifying that he felt he had “to stop here because if I go too far, I might say something they don’t understand, which would lead them to think that I am breaching something that’s not correct.” Removing these elements reduced emotional reactions to the lessons while still allowing space for engagement. Mr. Morelli made this distinction when discussing his approach to teaching contentious issues as he “[thinks it’s important to teach] something that is going to invoke some kind of emotion, which in turn is going to... invoke... engagement.” Still, he is careful to ensure that he encourages students to engage with the contentious nature of the content rather than “chaotic engagement.” The key for him is “be[ing] very structured.”

In addition to only focusing on question, task, and source sequences, they also opted out of explicitly connecting their lessons to modern issues in the form of a final formative question, task, and source set (Figures 2 and 3). By reducing overt connections between the lesson’s content and deeper themes throughout history and modern issues—specifically, how Reconstruction and its failure contributed to systemic racism and the similarities between the rise of fascist dictators in the 20<sup>th</sup> century and current American politics—teachers were subversively able to engage students in tackling topics and issues they might not have been able to otherwise because they would have hit a nerve with students or community members.

To what extent did Reconstruction change United States society from 1865 to 1900?		
<b>Standards</b>	<p>Explain the effects of government policy during Reconstruction on society from 1865 to 1877.</p> <p>Explain how and why Reconstruction resulted in continuity and change in regional and national understandings of what it meant to be American.</p>	
<b>Staging</b>		
Supporting Question 1	Supporting Question 2	Supporting Question 3
How did United States society change during Reconstruction?	How did United States society not change during Reconstruction?	How did Reconstruction's failure impact United States society long term?
Formative Task	Formative Task	Formative Task
Analyze the source for how they show change.	Analyze the documents for how they show continuity.	
Featured Sources	Featured Sources	Featured Sources
<p><b>Source A:</b> The Misses Cooke's Schoolroom, Freedman's Bureau, 1866</p> <p><b>Source B:</b> Frances Butler Lee, Letter to friend, 1867</p> <p><b>Source C:</b> Major General Reynolds, report to secretary of war, 1868</p> <p><b>Source D:</b> Fifteenth Amendment, 1870</p> <p><b>Source E:</b> James Rapier, African American congressman from Alabama, 1874</p> <p><b>Source G:</b> Ferdinand Barnett, African American lawyer, address to the NAACP, 1879</p> <p><b>Source H:</b> Atlanta Exposition, African American artists, 1895</p>	<p><b>Source A:</b> The Misses Cooke's Schoolroom, Freedman's Bureau, 1866</p> <p><b>Source B:</b> Frances Butler Lee, Letter to friend, 1867</p> <p><b>Source C:</b> Major General Reynolds, report to secretary of war, 1868</p> <p><b>Source D:</b> Fifteenth Amendment, 1870</p> <p><b>Source E:</b> James Rapier, African American congressman from Alabama, 1874</p> <p><b>Source G:</b> Ferdinand Barnett, African American lawyer, address to the NAACP, 1879</p> <p><b>Source H:</b> Atlanta Exposition, African American artists, 1895</p>	

Figure 2 | Mr. Morelli's lessons translated into the Inquiry Design Model

<b>Summative Performance Task</b>	<b>ARGUMENT:</b> To what extent did Reconstruction change United States society from 1865 to 1900? Write an essay featuring an argument citing evidence from the documents.
	<b>EXTENSION:</b>
<b>Taking Informed Action</b>	<b>UNDERSTAND</b> <b>ASSESS</b> <b>ACT</b>

Figure 2 (continued) | Mr. Morelli’s lessons translated into the Inquiry Design Model

How did the Versailles Treaty help cause World War II?		
<b>Standards</b>	HS.WH.CE.8 Determine the causes of the World Wars and their global effects between 1900-1945.  HS.WH.CO.2 Analyze examples of conflict created by global expansionist policies and actions between 1750-1945 across global regions.	
<b>Staging</b>	Analyze a political cartoon and identify the main idea of the cartoon.	
Supporting Question 1	Supporting Question 2	Supporting Question 3
How did World War I lead to the Versailles Treaty?	What caused World War II?	How did the Versailles Treaty impact Germany?
Formative Task	Formative Task	Formative Task
Summarize how the end of World War I leads to the Treaty of Versailles.	Identify four ways the Treaty of Versailles caused World War II.	Sort documents into how Hitler gained, maintained, and consolidated power.
Featured Sources	Featured Sources	Featured Sources
<b>Source A:</b> Background Essay	<b>Source A:</b> Germain Territorial Losses, 1919  <b>Source B:</b> Mein Kampf, excerpted  <b>Source C:</b> Articles 160, 231, 232, and 233 of the Treaty of Versailles, 1919  <b>Source D:</b> Germain Political Cartoon, 1920s	<b>Source A:</b> Propaganda posters, 1932  <b>Source B:</b> Hitler Youth images  <b>Source C:</b> Triumph of the Will, speech, 1935  <b>Source D:</b> Mass demonstration images

Figure 3 | Ms. Simpson’s lessons translated into the Inquiry Design Model

	<p><b>Source E:</b> Reparation Payments, chart</p> <p><b>Source F:</b> Victory Must Be Ours, Laurence V. Moyer, 1995</p>	<p><b>Source E:</b> Nuremberg Laws racial classification charts, 19 35</p> <p><b>Source F:</b> Kristallnacht, images</p>
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<b>Summative Performance Task</b>	<b>ARGUMENT:</b> How did the Versailles Treaty help cause World War II? Write an essay using evidence addressing the question.
	<b>EXTENSION:</b>
<b>Taking Informed Action</b>	<p><b>UNDERSTAND</b></p> <p><b>ASSESS</b></p> <p><b>ACT</b></p>

Figure 3 (continued) | Ms. Simpson’s lessons translated into the Inquiry Design Model

***Masking the Throughline***

The content in Mr. Morelli’s lessons on Reconstruction in the American South had clear connections to enduring issues in American history, even if his lessons did not explicitly teach them. Mr. Morelli actively chose, in both the design and delivery of this instruction, not to have students connect the failure of Reconstruction to modern social, political, and economic inequities as he worried such a connection would be contentious in the community where he taught. He shared,

... if you look at the failures of reconstruction, and you look at the progression of discrimination, especially in the 1890s through the 1960s and '70s, or through the 1960s when the civil rights acts were being passed, you see generations and generations of lack of education, lack of voting rights in the African American community, which is inherently just going to lead to that population of people in the country being held down. And I think that's what I wanted the kids to be

thinking about. And I really wanted them to be thinking about, that's only a couple generations away.

Explicitly including these connections in his lessons on Reconstruction felt too risky because Mr. Morelli was worried about pushback from parents and the community, saying,

Especially being an untenured teacher. I was not going to go down that route because if I get one kid in there who has been told that teaching about race is a bad practice of a teacher and they go and say I said that, 'blah, blah, blah, blah, blah'... I'd be getting preached to.

However, even though he did not overtly connect Reconstruction's failures to its long-term effects, he pushed the envelope as far as he felt he could in addressing them. He hoped students would take the next step and make those connections themselves. His choice to focus only on formative questions, tasks, and sources within the Reconstruction time period limited his risk in addressing the contentious issue of the existence and impact of institutional racism. If he were to have included all parts of an inquiry—especially the Taking Informed Action component, which has students extend their arguments into the civic realm—the likelihood of crossing into riskier territory would have increased because students would have had to extend their source analysis and summative arguments beyond the rigid time frame according to how Mr. Morelli talked about the long term impacts of the failure of Reconstruction.



The most explicit example of this happened three days into his implementation of an inquiry-based unit on Reconstruction. Students analyzed a document about newly freed Black children's obstacles in obtaining an education (Figure 4).

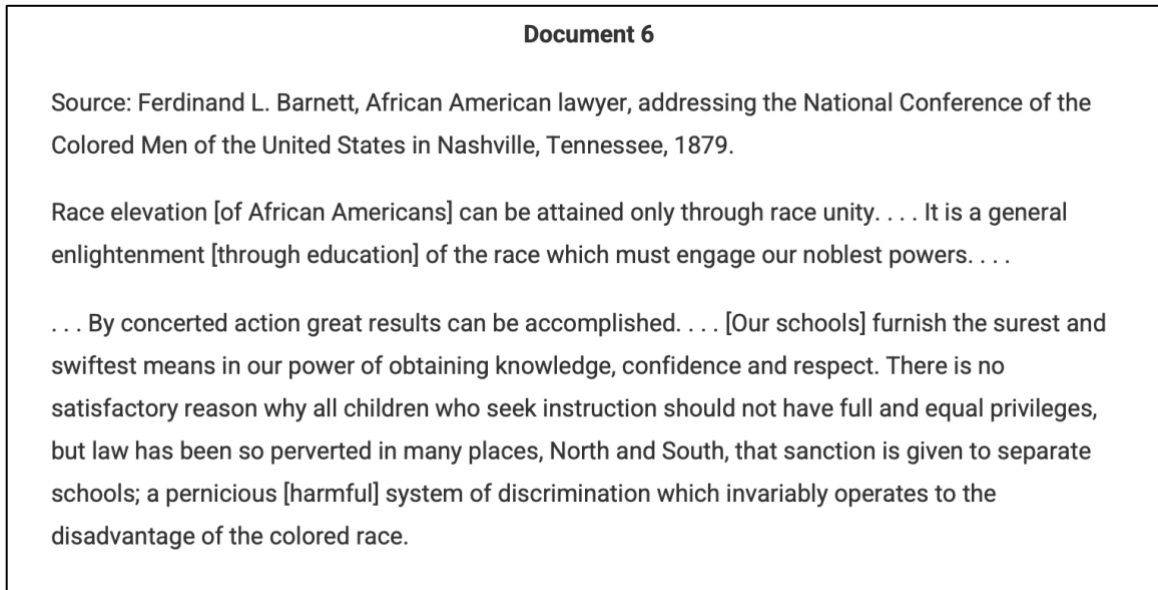


Figure 4 | Lesson source from Mr. Morelli’s Reconstruction lessons

While not built into how he designed the lesson, Mr. Morelli started to expand on student responses to the document by highlighting the long-term impacts unequal access to education had on Black Americans,

You had generations of people who were going to separate schools and weren’t getting the same education. It sets you up for generations and generations to not get what you need. I am going to say this, but I might not be able to say this.

When people talk about discrimination and inequality, it goes back to stuff like this, where people did not have equal access.

After this comment, Mr. Morelli immediately moved on and had students discuss the next source in the set. In our post-observation interview, Mr. Morelli clarified why he said the comment and why he did not further elaborate on it. He noted, “I was about to start

talking about how [unequal access] bled into the '50s and '60s and whatnot, and how that's still generational, causing racial discrimination in society. But it is a little nerve-racking as a teacher, given the current climate of things.” Mr. Morelli, in this instructional moment, chose to contain his discussion of unequal access created and maintained in a post-Civil War America to a source and task that focused on the past. While strongly suggesting the connection between this past injustice and modern inequities, he did not explicitly connect it to modern social, economic, and political inequities Black communities still face. He noted that he was worried students would misinterpret his point because they needed a deeper understanding of racism in the twentieth century to understand what he was going to say. “One phone call to the superintendent and I would be getting preached to.” In a comment Mr. Morelli wrote on the observation notes during his member check, he shared, “When I said this, I was about to start talking about CRT [Critical Race Theory], but I did not [because] I felt as though I might get in trouble.” His choice to contain student inquiry to examples of inequity in the past and not extend students’ arguments or emphasize civic engagement was because he felt he needed to protect himself from potential accusations about his teaching.

### ***Masking the comparison***

The content in Ms. Simpson’s lessons connected to modern American politics. Her lessons featured Europe’s interwar years and specifically examined how the Treaty of Versailles contributed to the rise of Hitler and, ultimately, World War II. During our post-observation interview, Ms. Simpson reflected on the similarities she saw between Europe’s interwar years and modern America sharing,

I think there are striking similarities between the political environment in the early 1900s to now and certain decisions that certain political leaders make and the things they say and the things they do. I think there's a really striking ... Kids get it, even when you don't say it.

Like Mr. Morelli, she was aware of how her lessons about the past spoke to contentious issues in the present and chose not to make those connections explicit in her design and delivery of instruction. For her, this was particularly important because of the similarities she saw between her instructional content and Donald Trump and his presidency. She shared that she was, “scared to make those parallels at times because I don't want them to be like, ‘She's equating,’ or, you know what I mean? I don't want them to, I don't know, I want them to think that.” It was important to her that the lessons did not devolve into modern partisan rhetoric where students compared Donald Trump and Hitler, noting that that is not “even personally [what she] thinks.” For her, this would minimize students' ability to view the questions, tasks, and sources and understand the broader political themes of the era. Therefore, removing any explicit connections to modern politics limited the risk in her lessons about the interwar period in Europe. Like Mr. Morelli's lesson on Reconstruction, Ms. Simpson kept the core of inquiry in the form of formative questions, tasks, and sources to contain student inquiry in the past. She did not include Summative Extensions or a Taking Informed Action sequence (Image 2). For her, talking about past patterns in clear terms was as close as she thought was appropriate when teaching about this time period. Again, like Mr. Morelli, she hoped that students could make the connection themselves. Seemingly for some students, this approach worked as in our post-observation interview, she told me about a student conversation she heard a

week after she wrapped up her lessons on the rise of Hitler and was teaching students about the Holocaust where, according to Ms. Simpson, a student yelled out, “that sounds like Donald Trump!” She noted that her first reaction was, “Yikes!” because she knew her community has Trump supporters who would push back to that comparison a student made but that “it made [her] heart happy to see them at least draw the parallel... and be like, ‘yeah, I have seen [this] before and yes, it is still a trend.’” Her choice to contain student inquiry to explore past patterns of nationalism and fascism rather than compare those past patterns to modern politics was because Ms. Simpson saw the importance of keeping her lesson from becoming partisan. She felt that it was more important for students to understand the factors that led to World War II than to be distracted by any historical comparisons.

### **Teaching within constraints**

While focusing on small units of inquiry limited the risk Mr. Morelli and Ms. Simpson faced as they taught contentious social studies, their decision to implement smaller question, task, and source sequences was also made for practical reasons. Factors like class time interruptions, social studies standards, and the teacher’s familiarity and comfort level with implementing inquiries designed using the IDM affected their choice to focus on smaller units of inquiry. These factors may have been more influential in the teachers’ choices to implement smaller units of inquiry than their desire to contain the risk of teaching contentious social studies.

### ***Logistical Constraints***

Practically speaking, both teachers faced logistical constraints in their teaching. During my study, class time was interrupted by a band trip to New York City, holiday

breaks, school-wide Positive Behavior Interventions and Supports (PBIS) incentives for students, and state-sanctioned standardized testing. Frequent interruptions to class time made it difficult for the teachers to implement instruction that required instructional continuity to be most effective. Additionally, Mr. Morelli had four classes he had to prep for each day, which limited the amount of time he had to devote to designing an inquiry based on the IDM, and Ms. Simpson was pregnant and experiencing sickness in her first trimester, which caused her to miss school to attend to her medical needs. Finally, the breadth of instructional standards the teachers had to cover during the year limited the amount of time they could devote to issues. Ms. Simpson said, “I wish we had more time... I could really go into Great Britain... We don’t talk about Mussolini... I just feel like if they could really understand, especially what’s going on in Italy at the same time, maybe it would help them make that connection a little bit better.” While beyond the teachers’ control, these limitations restricted their ability to design and deliver inquiry-based instruction using every component of the IDM.

### ***Professional Constraints***

However, these limitations might not have been so restrictive had the teachers felt more comfortable with implementing inquiries designed with the IDM. While Mr. Morelli had experience in his teacher preparation program designing inquiries and some experience in his student teaching experience implementing them, he still struggled to conceptualize how an inquiry designed using the IDM functioned in his current classroom. When asked about how his approach to using the IDM has changed over time, he noted he has, “gone away from thinking that everything has to be...inquiry all the time... [I’ve] realized, no, that can’t be because [students] don’t have the background

knowledge.” Therefore, beyond containing risk, the smaller units of inquiry allowed Mr. Morelli to feel he had more control over the lesson by ensuring students had background knowledge before diving into questions, tasks, and sources. Unlike Mr. Morelli, Ms. Simpson had limited experience with the IDM in part due to her teacher preparation program and in part because of her limited experience as a new teacher. Her teacher preparation program did not teach her about the IDM and her only experience with the model was collaborating with Mr. Morelli and attending a teacher workshop in the summer and fall of 2022. She told me in our first interview that, “this [was] really [her] first full year in social studies... Mr. Morelli, honestly, I think, taught me mostly everything I know.” Ms. Simpson’s understanding of the model and its implementation were limited to what she could glean from professional development and colleague collaboration.

### **Summary**

Rather than designing and delivering inquiry-based instruction that incorporates all of the IDM’s components, teachers opted to focus on smaller question, task, and source sequences in their inquiry-based lessons. This decision was not made solely because it contained the risk of teaching contentious social studies, as limiting the extent of their inquiry practice was primarily made because of logistical and professional constraints. Yet, even if these factors were more influential in their choice to limit the scope of their inquiry-based lessons, it does not discount how Mr. Morelli and Ms. Simpson utilized smaller units of inquiry to limit their risk in teaching contentious social studies. Ultimately, their choices to opt for small inquiry units also reduced their risk of

pushback as they tackled lessons featuring contentious social studies as they masked cause and effect and historical comparison.

### **The Teachers Controlled the Pace of Inquiry-based Instruction**

In addition to designing inquiry-based learning into smaller sequences of formative questions, tasks, and sources, the teachers intentionally slowed down their progression through the questions, tasks, and sources. Mr. Morelli and Ms. Simpson's choice to slow down instruction can be seen in their day-to-day lessons and year-long curriculums. In slowing down their instruction, teachers gained more control over the inquiry process to better regulate the emotionality and monitor student understanding of the issues. This approach allowed them to check for problematic thinking and disrupt it before students constructed their arguments. Like Mr. Morelli and Ms. Simpson's emphasis on smaller units of inquiry, slowing down the progression through inquiry-based lessons was something the teachers did regardless of if they labeled the lesson contentious or not. However, both teachers knew that, while the strategy was not explicitly used to contain risk while teaching contentious social studies, it was an effective strategy when they featured contentious social studies in their lessons.

### **Controlling the pace and analysis**

In the lessons I observed, the teachers insisted that students move through the formative questions, tasks, sources, and summative argument slowly and deliberately to avoid misunderstandings or problematic thinking. Specifically, the teachers controlled the pace and order students worked through analyzing the sources and chose to heavily scaffold source analysis and synthesis in addition to students' final arguments. While they told me they took this approach to inquiry in other noncontentious lessons, Ms.

Simpson shared that when it came to teaching contentious social studies, controlling the process helped her not “really ... worry about if they’re coming to [a] conclusion on their own,” because she knew her questions and scaffolds set them up to construct an argument based on an accurate analysis of the sources.

### *Slow-paced lessons*

The design of both teachers’ lessons could have been accomplished by students working independently, especially considering the questions accompanying the sources and the fact that Mr. Morelli and Ms. Simpson did not rely on direct instruction in the form of lecturing to teach. However, they both followed a similar path in implementing the source analysis in their classrooms and chose to actively facilitate student engagement with the sources (Figure 5). Mr. Morelli and Ms. Simpson had students work on one or two sources at a time, depending on the general ability level of the class, and divided the time spent on each source into individual and communal analysis and discussion.



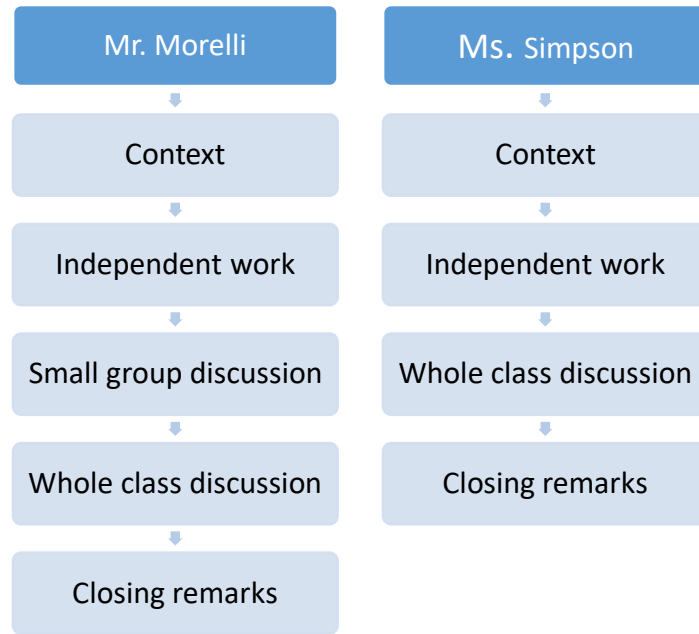


Figure 5 | Instructional source analysis pattern

Progressing through source analysis in this fashion aided Mr. Morelli's and Ms. Simpson's containment of risk in two ways: first, it gave students time to make sense of the source before they spoke about it with their classmates. Second, the teachers used whole group discussion to assess how students interpreted the source and offer necessary guidance in the form of clarifying questions and context. In having students work with the source independently before sharing, the teachers provided space for students to comprehend and wrestle with the source before sharing their thoughts aloud with others. According to Mr. Morelli, structuring source analysis in this manner gives students a lot of different opportunities to become familiar with the source. He says,

...my thought process behind it is, all right, they have the time individually to read it and break it down because they need to be able to do that individually. And then they have time to discuss with someone and flush out the ideas. So then by

the time we're going to share out, they've heard someone else's ideas and they've discussed their own, they might feel more confident now to share out and be ready to discuss the documents.

For Mr. Morelli, this strategy allows students to analyze documents independently while ensuring multiple opportunities for collaboration and course correction if needed. What follows is a typical example of how Mr. Morelli facilitated this strategy in his instruction practice:

Mr. Morelli introduces the question and sources for his inquiry-based lesson on Reconstruction. He tells students that they will evaluate the documents for change and continuity.

Mr. Morelli: Okay, in our first document, we have an image. How do we analyze an image? What is the first thing we do with an image? What do you see? Then, what do you think, then, what do you wonder? What else? Contextualize the image. Title, when it was published, and all that jazz.

Mr. Morelli gave students 7 minutes to look at the image and answer three questions independently (see below).



1. What do you see in the image above? Based on what you see, what do you think the Freedman's Bureau was?
2. Given the image above and your answers to number one, what groups of people do you think would have supported the Freedman's Bureau? Who do you think would have not supported it? Explain.
3. Does this show a change or continuity in the United States during Reconstruction? Explain.

Mr. Morelli: Make sure you point to something specific in the image on number one. If your back is facing the wall, you will share with the person opposite you.

Students shared what they wrote with their partners, switching halfway, so both partners shared.

Mr. Morelli: What group of people do you think supported the Freedman's Bureau coming out of the Civil War?

Student A: People who supported might be abolitionists or reformers from the north.

Mr. Morelli: Good. Who do you think might have gone against?

Student A: I would say southerners. Supporters of slavery.

Mr. Morelli: Maybe former slave owners or former confederate soldiers who were upset they lost the Civil War. Okay, everyone, come up with a group definition of what you think the Freedman's Bureau is.

Student pairs joined the other pair at their table and worked in groups of four to write a definition based on the image they analyzed.

Mr. Morelli: Okay, who has a definition and is like, wow, that is everything we needed?

Student B: It was an institution that helped African Americans integrate into society.

Mr. Morelli: What specific African Americans?

Student B: Newly freed slaves.

Mr. Morelli: Good start. There are a lot of institutions that tried to do this, what was their approach? Education.

Student B: It was an institution that helped African Americans to integrate into society through education.

Mr. Morelli: Now, answer that next question. Okay, this is pretty obvious. This is change.

Student C: Slaves weren't allowed to be educated before this, so this was a massive change.

Mr. Morelli: As we look through, we will see how our government hindered this change. Okay, on to document two.

Mr. Morelli had students move onto analyzing the next source, a letter from a former enslaver detailing her views of Reconstruction policies.

In this excerpt from Mr. Morelli's lessons, you can see how he properly attends to analyzing and interpreting the source with his students and, ultimately, privileges the role of sources in inquiry-based instruction. First, he frames the source by reminding students how to analyze an image. Then he gives space for students to interpret the source—first on their own, then in group settings—before asking questions that clarify what he wanted students to take away from the source. It was important to him that students see how

education was viewed as a way to combat racial inequities so that students could later understand why it was significant that formerly enslaved Black Americans were denied equal access to education.

### **Playing the long game**

In addition to slowing down their approach to contentious social studies in their lessons, teachers also viewed the teaching of contentious social studies as a course-long endeavor. Mr. Morelli and Ms. Simpson knew how their curriculum worked together throughout their courses and intentionally built up toward riskier questions, tasks, and sources as students gained more content knowledge and analytical skills. Specifically, the teachers used repetition to work towards riskier engagement with contentious social studies over time. They believed that students' thinking about issues would evolve over the year.

### ***Building of risk***

As social studies teachers who wanted their students to become critical thinkers, Mr. Morelli and Ms. Simpson believed in exposing their students to new ideas. When talking about her students, Ms. Simpson said, “[they’ve] never really been exposed to anything. I do think that's part of my job.” Exposure, for them, came in long-term exposure to content and instructional practices. The lessons I observed were not the first time Mr. Morelli and Ms. Simpson taught a series of lessons based on contentious social studies. Mr. Morelli talked about challenging students' preconceived notions of historical figures like Thomas Jefferson and Christopher Columbus and Ms. Simpson shared how she challenged students' preconceived notions of social institutions when she taught about the Catholic Church in the Middle Ages (Table 11).

Mr. Morelli	I think a lot of things they've read this year, they've been like, oh wait, this is how it actually went. Reading about Jefferson, the amount of slaves that he had, and reading about Columbus and the Puritans' interactions with the Wampanoag Native Americans, I think all year, they've been a little like, "Oh, this is how ..." We dove a little deeper into these issues a little more clearer.
Ms. Simpson	Religion has been hard for me with World because we've got the Catholic Church and it's just very problematic and there's a large Christian community and so I do, when I present that information, I guess I did try to be considerate of that and be like, "Okay, I need to, maybe not ..." But then at the same time you can't lie and be like, "Okay, they we're good people." It's medievally. Maybe I should be better at that, I don't know. But I don't know. I know what I have to teach and not do it and if they don't like it, I'm so sorry. Just my kids, I'm like, "I don't know. I'm sorry."

Table 11 | Previous experiences with contentious social studies

Having tackled contentious social studies before made it easier for them to engage in it during the lessons I observed. Further, the teachers knew that their engagement with contentious social studies content built over time as both Mr. Morelli and Ms. Simpson talked about additional lessons that built on student understanding of structural racism and xenophobia (Table 12).

Mr. Morelli	Well, the chapter we just read this past week really got into the 1890s when Jim Crow became really prominent and whatnot, and with Plessy v. Ferguson too and all that. So it's going to obviously continue and then when we get after World War II into the suburbia life and all that and discrimination there. And so I think there's potential to keep that conversation going. It might even be cool if you came back in March and looked at how it grew, how we can go back to these topics with the failures of reconstruction and look at them.
Ms. Simpson	I so wish you were here this week because we were talking about the Holocaust and they started talking about Kanye West, and Donald Trump... Donald Trump supporting Kanye West and antisemitism within the United States right now. And I was like, "Yes, you're getting it. You're so totally understanding it."

Table 12 | Intended future lessons on contentious social studies

### Summary

In their efforts to maintain control over inquiry-based learning featuring contentious social studies, the teachers slowed down the pace at which they had students work through the content. Specifically, in the lessons I observed, both teachers minimized analytical jumps by not allowing students to work ahead in their source analysis and heavily scaffolding students' source analysis and summative arguments. Additionally, in their curriculum plans, the teachers built up to riskier questions, tasks, and sources as the school year progressed. These approaches, at the micro and macro level, contributed to their control over the inquiry process as a means to limit the risks they took in featuring contentious social studies in their classrooms.

### **The Teachers Privileged Safety Over Openness**

In their inquiry-based lessons featuring contentious social studies, Mr. Morelli and Ms. Simpson exercised instructional and environmental control to maintain a safe learning environment. In their instructional design, the teachers maintained a large degree

of control over how students talked and argued about contentious social studies in how they framed their deliberative questions and scaffolded sources and student argumentation. They controlled these aspects of their instruction to prevent students from constructing a problematic argument, one that would uphold injustice or oppression. In their classroom environments, the teachers maintained a safe environment for discussion by having student discussions grounded in evidence and upholding norms around language use and disposition. Emphasizing these elements in their classrooms allowed space for students to feel discomfort without resorting to shame-based practices.

### **Instructional Control**

Despite designing their lessons around inquiry-based instruction in which students theoretically drive learning, the teachers maintained a significant amount of control in their instruction through their use of questions and scaffolds. Specifically, the teachers based their lessons on an overarching deliberative question (called the Compelling Question in the IDM), which they carefully selected and modified to curtail any risk associated with students constructing their own arguments. Additionally, they used source analysis questions to guide students' source interpretation and outlines to guide students' argument construction so that students took away the correct information and analysis from the sources.

### ***Deliberative questions***

The units I observed revolved around an overarching deliberative question. For both teachers, each week of instruction featured a deliberative question that students answered in the form of an argument at the end of the week (Table 5). These deliberative questions were carefully crafted to limit risk. As defined in Chapter 2, deliberative



questions are ones in which there are multiple acceptable arguments. How Mr. Morelli and Ms. Simpson selected and structured the deliberative questions that drove their instruction spoke to their desire to privilege safety over openness because the questions had built-in parameters. All the questions presumed an acceptance of a historical stance. For example, Mr. Morelli’s questions about the role of slavery in the Civil War and Reconstruction put forward that slavery was the driving issue behind the Civil War and that the Reconstruction period that followed was necessary for ensuring newly freed Black Americans their freedoms. Likewise, Ms. Simpson’s questions put forward that international policies drove the rise of Hitler and World War II. Students were allowed to deliberate within these stances but not depart from them.

<p><b>Mr. Morelli</b></p>	<ul style="list-style-type: none"> <li>• Evaluate the extent to which Lincoln’s position on slavery changed from 1858 to 1860.*</li> <li>• Evaluate the extent to which Reconstruction changed United States society in the period from 1865 to 1900.*</li> </ul> <p>*While these are written as statements to better reflect the style of prompt students see on the AP US History exam, they function as deliberative questions (To what extent did...?) in this classroom context.</p>
<p><b>Ms. Simpson</b></p>	<ul style="list-style-type: none"> <li>• How did the Versailles Treaty help cause World War II?</li> <li>• How did the end of World War I impact Germany?</li> </ul>

Table 13 | Deliberative Questions

For these teachers, the opportunity for students to answer the question in multiple arguments presented a risk when teaching contentious social studies, as there was the possibility that students would argue a problematic stance. Having students deliberate about American Slavery and Reconstruction and Europe’s interwar years opened opportunities for students to say racist and antisemitic comments. Ms. Simpson knew

before beginning her instruction about the interwar years and the rise of Hitler that some of her students held antisemitic beliefs. She shared,

One kid was talking about Bitcoin and how the major key holders in Bitcoin are Jewish, and that's why they haven't regulated Bitcoin is because they don't want to impede on the Jews. I just sat there like, "Wait, what? What did you just say?"

Ms. Simpson was cautious in allowing students to construct arguments based on their interpretation of sources and narrowed student deliberation to ensure students made evidentiary claims.

Mr. Morelli was similarly influenced by his understanding of how his students' cultural environment might impact their source interpretation and, ultimately, their arguments. In sharing about previous experiences with parent pushback he noted that once "[he] had a parent call on [him] because [he] said something about the Confederate flag." He clarified that he was,

going over what had happened on January 6th a year ago and there was some picture on there... [of] some guy... with a Confederate flag and I said, "Well, look at that. That's so stupid." I shouldn't have said that. And a parent called and was like, "he called the flag stupid."

Experiencing pushback on comments about the Confederate flag made Mr. Morelli more deliberate and cautious in approaching the Civil War because he knew there was disagreement among community members about what the former Confederacy symbolized.

Therefore, knowing their students and some of the community's beliefs, Mr. Morelli and Ms. Simpson felt it was important to communicate boundaries and set expectations for how students could answer the overarching questions in how they crafted the questions. Rather than designing deliberative questions with potential arguments centering on *yes*, *no*, or *maybe*, the teachers designed deliberative questions that focused on evaluative answers. Students then argued about the extent to which something accomplished its intended purpose or which factor was most influential. Ms. Simpson shared that she wanted her students to know that “there is no devil’s advocate” when it came to things like anti-Semitism, something she reiterated in her lessons. Mr. Morelli expanded on that idea by explaining why he intentionally told students that Reconstruction was a failure because it failed in ensuring newly freed Black Americans the ability to exercise their freedoms,

Regardless of how we debate change or continuity here and there with these documents, every historian would agree that this is the factual history of this time period. So let me see which one. I think I said at one point, historians argue really that reconstruction had a lot of failures to it, which I mean, that's it. That's the facts. And I like to make sure that as much inquiry as I do, there are things that we can't debate in history that historians even would say, this is it. There were a lot of failures to Reconstruction.

Considering that some things in history are not open to debate, Mr. Morelli and Ms. Simpson thoughtfully selected and constructed the deliberative questions that guided their instruction. Ultimately, they sacrificed openness in the form of student intellectual

autonomy to maintain a classroom safe from comments or arguments supporting racist or xenophobic ideologies.

### *Source analysis questions*

Mr. Morelli and Ms. Simpson did not leave source analysis to chance. It was important to them that students gleaned specific information from each source so that they could construct their summative arguments in a specific way. Specifically, both Mr. Morelli and Ms. Simpson utilized questions to help students comprehend and analyze documents. Regarding the lessons I observed, maintaining control of how students interpreted the sources kept them from worrying that students would take away the wrong information from their lesson or argue problematic views. Ms. Simpson's inquiry-based lessons were based on a unit produced by the DBQ Project, a resource that offers documents with or without source analysis questions. She gave students the version of the DBQ that came with source analysis questions. She shared,

I like that most of the time, the questions are really geared towards whatever point I want [students] to make. So, I don't have to necessarily worry about if they're coming to that conclusion on their own... the questions are really worded and geared towards a specific mindset that I think relieves some of that anxiety where I don't have to... Where I do let go of that a lot of that control and they are interpreting on their own. I'm rest assured knowing that the questions are guiding them in that right direction.

Likewise, Mr. Morelli based his inquiry on a source set he pulled from AP Central. The sources did not come with analysis questions, so Mr. Morelli wrote questions to

accompany each source to help students analyze them. When talking about his decision to include analysis questions, Mr. Morelli said,

I wanted scaffolded questions ... I think at the end of every document was, "Is it showing continuity or change in society?" ... So, while they're so reading the documents and answering questions, they're planning evidence for the essay and planning the essay.

In effect, the document questions assured student analysis in line with how Mr. Morelli and Ms. Simpson wanted students to use the documents in their final arguments. These questions meant that the teachers could control what students took away from the sources and, ultimately, their key takeaways from the lessons. In maintaining control through the questions, both teachers contained the risk they saw in students interpreting sources on their own and were able to prevent inaccurate or problematic thinking that might have emerged from the sources. This especially rang true when Mr. Morelli's students analyzed a source about the emergence of the KKK during Reconstruction (Figure 6) and when Ms. Simpson's students analyzed sources about Nazis propaganda and indoctrination (Figure 7).

Source: Major General J. J. Reynolds, report to the United States secretary of war, 1868.

Armed organizations, generally known as "Ku Klux Klans," exist, independently or in concert with other armed bands, in many parts of Texas, but are most numerous, bold, and aggressive east of Trinity River [in eastern Texas].

The precise objects of the organizations cannot be readily explained, but seems, in this state, to be to disarm, rob, and in many cases murder Union men and negroes, and as occasion may offer, murder United States officers and soldiers; also to intimidate everyone who knows anything of the organization but who will not join it. . . .

To restore measurable peace and quiet to Texas will require . . . that troops be stationed at many county seats. . . . This will be the work of years.

- 1) According to Major General J.J. Reynolds, what is a major threat to Texas? Who do they pose a threat to in Texas?
- 2) Why do you think the Ku Klux Klan emerged in the Era of Reconstruction?
- 3) Some historians argue that the South (the KKK and intimidation groups existed all over the South) became more dangerous after slavery rather than during for African Americans. Do you agree or disagree?
- 4) Does this show change or continuity in the United States during Reconstruction? Explain

Figure 6 | Document and questions about the role of the KKK in limiting the impact of Reconstruction

Hitler Youth performing the Nazi salute at a rally in Berlin, 1933  
[Image is courtesy of wikimedia commons and is licensed under the Creative Commons Attribution-Share Alike 3.0 Germany license.](#)

Hitler Youth at rifle practice, circa 1943  
[Image is courtesy of wikimedia commons and is licensed under the Creative Commons Attribution-Share Alike 3.0 Germany license.](#)

Poster: "Youth Serves the Leader: All 10-Year-Olds into the [Hitler Youth]"  
[Image is courtesy of wikimedia commons and is licensed under the Creative Commons Attribution-Share Alike 3.0 Germany license.](#)

1. What was the purpose of Hitler's Youth?
2. How did Hitler's Youth indoctrinate the youth?
3. Why was it important for Hitler to target youth?
4. Some forms of indoctrinating young people included textbooks and children's books. Why would the Nazi party choose textbooks and children's books to spread Nazi beliefs?

Figure 7 | Images and questions featuring information about the Hitler Youth

### *Scaffolding argumentation*

Finally, both teachers provided students with detailed outlines to help students structure their summative arguments based on the sources. Like the questions, the outlines forced students to engage with the sources in a specific manner that prevented them from going off script in their arguments. Notably, Mr. Morelli and Ms. Simpson wanted to ensure that students were basing their arguments strictly on the sources and the answers to the source analysis questions. Ms. Simpson told students in one of her classes, as they prepared to write,

Your evidence needs to support your claim. So, if you claim that territorial loss led to World War II, you will use the evidence about territorial loss. As you are going through, there are questions under each document that tells you what is important in each document.

Argumentation in their classrooms was a controlled exercise with clearly defined parameters in the form of scaffolds. Students were expected to make their arguments based on the sources, which, as discussed previously, had analytical questions cluing students in to how they were to be interpreted. Additionally, the teachers gave a lot of feedback—Ms. Simpson gave it as students wrote their arguments and Mr. Morelli gave it after—that enforced the expectations they laid out in their outlines. In providing these scaffolds, the teachers controlled how students made their arguments, which made them feel more comfortable teaching lessons that featured contentious social studies and culminated in summative arguments.

### **Environmental control**

Beyond how the teachers controlled source analysis and argumentation through questions and scaffolds, Mr. Morelli and Ms. Simpson carefully controlled their classroom's environment during deliberation to ensure it was a safe space to learn about contentious social studies. For Mr. Morelli and Ms. Simpson, a safe space meant one that was explicit in expectations for engagement so that it would be safe for students to encounter information that might differ from what their community taught them and free from problematic and harmful ideologies.

### ***The importance of evidence***

Mr. Morelli and Ms. Simpson clearly communicated to students how they expected them to engage in discussion by how they structured and led it. Specifically, they expected student comments to be evidentiary. Their emphasis on evidentiary comments was set before they engaged in discussion, a tactic that allowed both teachers to ensure student talk was evidentiary and safe when they opened the classroom up to



whole-group discussion. Ms. Simpson frequently reminded students to base their answers and comments on the sources. At the beginning of her lessons on the Treaty of Versailles, a student answered a question about Germany's response to assuming the war guilt for World War I by saying, "my guess is that they were poor and weak." Ms. Simpson responded, "well, let's not guess, let's use evidence." In this simple statement, she set an expectation for how students should be engaged as they worked through the sources and constructed their arguments.

Similarly, Mr. Morelli often reminded students to "get [their] evidence sorted out" when he gave feedback on student claims (something he did frequently in the two weeks I observed). He noted in an interview that,

... there's a fine line between contentious engagement and just chaotic engagement. Contentious would mean that they are developing arguments based on sources. That they're engaging with those arguments, and they're trying to make those arguments so good that they can out argue someone else.

In this quote, he is using the word contentious as a positive descriptor and his meaning aligns with the notion of controversial or deliberative as defined in Chapter 2. For him and Ms. Simpson, emphasizing student use of the sources in their claims and discussions allowed them to control a potentially risky situation by curtailing what students were allowed to discuss. If students are only allowed to make statements and arguments based on the sources and Mr. Morelli and Ms. Simpson are the ones who vetted the sources and selected or constructed the analysis questions, then they hold a significant amount of control over the discussion. Mr. Morelli's students, aware of the expectation, also upheld it in small and whole group discussions. For example, students were told to edit another

student's claim and discuss what they wrote. What follows is an example of that from Mr. Morelli's classroom:

Students were asked to write an argument addressing the prompt: Evaluate the extent to which Reconstruction changed the United States from 1865 to 1900.

Mr. Morelli: Okay, you will swap your writing with the person on your shoulder. Give them two positives about their paragraph, suggest one thing to improve, and ask them one question. Write on their paper.

As you are reading, think about whether they are discussing change and continuity in this period. Are they conveying that with the documents?

Okay, now share with your partner what you put.

Student conversation was about how students constructed their arguments and not necessarily about the arguments themselves.

Mr. Morelli: Who wrote in their writing that there was more change than continuity?

A student shares with the class.

Mr. Morelli: Okay, good, the integration of African Americans into society.

Who had there was more change?

A student shares with the class.

Mr. Morelli: So you pulled outside information. That's okay.

What did you tell your partner they could do to improve their writing?

Student A: So Student B did not use anything from the documents, he was just kind of doing his own thing.

Mr. Morelli: Okay that is important, you always need to use the documents. What other things are you looking for when someone is using documents that is essential?

Student A: Making sure your evidence is correct.

Mr. Morelli: What do you need to do prior to ensure you are correct?

Student A: Analyze. Use HIPP. (HIPP is an acronym that stands for Historical Context, Intended Audience, Point of View, Purpose)

Students knew exactly how to engage in discussions because it was a repeated practice.

They knew that what they said had to be backed up by evidence from the sources.

Familiarity with the practice and constant reinforcement made its use in lessons that featured contentious social studies more effective at reducing risk because students viewed it as ordinary.

### ***The importance of words***

In addition to expecting student discussions to be based on evidence, the teachers also expected them to use appropriate language during discussions. Mr. Morelli and Ms. Simpson did not assume that students knew how to discuss topics like racism and genocide and gave guidance and reminders while engaging in them. In Mr. Morelli's class, he noticed that students struggled to know how to refer to newly freed Black Americans because the sources used antiquated terms like "colored" and "negro." One

student said the following about an image of a schoolroom, “this looks like a classroom of colored people crowded with a bunch of students and not a lot of teachers. We think the freedman’s bureau has something to do with education.” Later, another student commented, “the KKK is targeting the union men and soldiers and Negroes and are basically lynching them.” Both students struggled in their speech as they got to those words, suggesting they were unsure of the appropriate term. This struggle could have been because students were unsure if they should use the terms they saw in the sources, as they knew they had to use evidence from the sources in their discussions but also felt uncomfortable saying them, or because they heard those terms used by community members and knew that they might not be appropriate in the classroom. Regardless of why students were unsure of what language to use, Mr. Morelli paused during instruction to give guidance on how students should refer to newly freed Black Americans when they talked about the sources saying, “okay, this will come up a lot in the next chapters [the term *negroes*], let’s just use the word African Americans. Not to erase historical terms, but for the sake of history class.” His correction was delivered matter-of-factly, and his attitude was not accusatory but with the intent of improving. After making the correction, he immediately returned to discussing the sources, and students used the word African American for the remaining classes I observed.

While I did not observe Ms. Simpson clarify vocabulary in a class discussion, she shared an example from earlier in the year when a student referred to Middle Eastern people as “ay-rabs,”

there's one kid in my third period, I love him to death, and I corrected him immediately, but it's like, they're not “ay-rabs,” stop calling them that. He was

like, "I had no idea that that was racist." It's just a culture, I think, where they're taught really racist stuff.

In her response to the student using the derogatory term, she was clear in her correction because she understood that a student might be using a derogatory term because they have not been told it is derogatory.

The way both teachers approached correcting students promoted the safety of the classroom in two ways. First, using inclusive and anti-racist language is foundational to safe classrooms. Talking inclusively curbed the promotion of harmful stereotypes. Additionally, how the teachers approached correcting students was based on creating an inclusive and safe classroom and emphasized students' ability to change their actions rather than shame. While students might have felt uncomfortable in their conversations about racism and genocide and embarrassed by being corrected, they were not fearful or made to feel shame.

### ***Striking the right tone***

Like the emphasis on inclusive and antiracist vocabulary, Mr. Morelli and Ms. Simpson were careful to curtail humor and lightness when talking about topics that required an attitude of respect. Mr. Morelli often joked and was lighthearted with his class and shared about his pets or television shows he had watched; however, he was very cognizant of never using humorous or lighthearted tones when discussing Black oppression. Likewise, Ms. Simpson was lighthearted with her students about personal matters but treated what she taught with an air of respect that she also expected from her students. For example, when her students were analyzing sources about the racial classifications under the Nuremberg Laws, some students started to joke around:

Students had just viewed and completed source analysis questions for sources about the Nuremberg Laws. While students were evaluating if the Nuremberg Laws helped Hitler gain, consolidate, or maintain power, a student began asking questions about Hitler's motive.

Student A: So, question, was Hitler lying in bed one night thinking, "oh yeah, this is the Jews' fault?"

Ms. Simpson: This happened over a long time. They choose minorities to scapegoat. We do this in modern times with minorities. We choose them to blame things on an event the problem is on a wide scale.

We will talk about this next week, but they target more than just Jewish people. Gypsies, people who are gay.

Student A: How would they know people were gay? Couldn't they just hide it?

Ms. Simpson: No, because how did they know about the Jews?

Student A: Well, if you hid them...

Ms. Simpson: Well, you would get in trouble if you were hiding them.

Student A: Well, if you were gay, they wouldn't do the same things to you that they did to the Jews.

Student B: What if you were gay and Jewish?

Students start to giggle.

Ms. Simpson: No, this isn't funny. This a serious thing and that is disrespectful to giggle.

Reflecting on the situation later, Ms. Simpson shared that the student who started this conversation identifies as queer. She said, “I honestly think she was thinking about herself. Like, ‘I probably would’ve been a victim of the Holocaust.’ And I think that she was using humor to cope with that.” She noted that many of her students use humor as a coping mechanism when they feel uncomfortable, but it was important to her that they respect tragedies like the Holocaust. Expecting students to approach discussions on these topics from a respectful posture and setting and reinforcing that expectation helped students know what was expected of them while also teaching them how to engage in uncomfortable conversations.

### **Summary**

Teachers privileged safety over openness in their inquiry-based instruction. They used questions and scaffolding to control how students constructed arguments to ensure they were safe and free from problematic rhetoric. Additionally, the teachers controlled the classroom environment to ensure students deliberated safely by setting expectations around discussions being evidentiary, free from harmful language, and respectful. These expectations meant that the classroom environment was a productive space for students to both deliberate, as they were not permitted to make unsubstantiated arguments or use harmful language, and learn, as students were corrected when they deviated from these expectations.

### **The Teachers Distanced themselves from Contentious Social Studies**

While Mr. Morelli and Ms. Simpson highly controlled their lessons in their design and delivery of instruction, they also distanced themselves from the curriculum. The

context in which they taught and their chosen curriculum allowed them to abdicate responsibility from instructional choices. Distancing themselves in this way made the teachers feel safer when they taught contentious social studies because they could legitimize and defend their instruction if they encountered pushback. The teachers distanced themselves from contentious social studies through standards and instructional tactics.

### **Standards**

Mr. Morelli and Ms. Simpson distanced themselves from their curricular choices in designing and delivering instruction that featured contentious social studies by deflecting responsibility to standards and curriculum. The teachers adhered to prescribed standards in the form of the AP US History standards and the state standards. Both standards align with inquiry-based instruction, with the state standards being based on the C3 Framework and AP standards emphasizing deliberative questions and primary sources. If they encountered pushback on their instruction, both teachers felt comfort and safety in their ability to point to a standards document that would validate their instruction.

Mr. Morelli and Ms. Simpson, like all teachers who are public school or AP teachers, had to abide by state standards and AP standards in their instruction. Having standards that required them to teach certain skills, events, and perspectives allowed the teachers to point to the standards to justify what they taught rather than take full responsibility for their choices. Additionally, for them, adhering to the standards was more important than catering to outside commentary on their practices. Ms. Simpson, when talking about how legislation and public debates over what is taught in social



studies impact her instruction, shared that she is "... very matter of fact and I know what the standards say. I have to teach you and I present it in a way that's factual. And if you don't love it because your mom told you not to, I'm sorry." The standards empowered her to continue teaching in line with her values and choosing to teach about topics and issues that might challenge some students' worldviews (an example she gave was organized religion and the Catholic Church in the Middle Ages). It is important to note that while she must adhere to the state standards in her teaching, there is a degree of teacher choice in how the standards are implemented, especially considering Kentucky currently has no system to hold districts accountable for implementing them. Therefore, Ms. Simpson's choices about how she teaches the standards in her classroom are still very much up to her as what she emphasizes and spends time on are under her jurisdiction.

Mr. Morelli expressed a similar deflection. As an AP teacher, he is tasked with teaching a standardized curriculum produced by the College Board. When talking about the impact legislation and public conversations had on his instruction, he shared,

I teach AP United States History and College Board released a statement when several states are passing these sorts of bills and laws. And College Board said, If your state requires that you cannot teach things like Critical Race Theory, then you will not be allowed to teach this course because we don't abide to the state laws when it comes to this, and we're not going to change our curriculum to meet that. So I mean, I don't have a choice but to teach that regardless, because that's what my curriculum calls for. And College Board doesn't adhere to Kentucky standards. They're their own institution. So, I go along teaching it anyways, because I have to.

More so than Ms. Simpson, Mr. Morelli's instruction was influenced by the College Board's standards because they culminate in a standardized national exam and offer recommended curriculum materials like source sets and textbooks. Therefore, any pushback he might receive on his curriculum choices can be deflected back to the College Board. Ultimately, having the weight of the College Board behind him made him feel safer in broaching more contentious issues because he could point to the institution as responsible if he experiences pushback.

### **Instructional Tactics**

Another way the teachers distanced themselves from responsibility in teaching contentious social studies was by relying on instructional tactics in line with inquiry-based learning. Notably, Mr. Morelli and Ms. Simpson relied on sources and field experts to communicate riskier information in their lessons on contentious social studies. They did this by teaching through primary and tertiary sources and referencing historians' arguments when saying something that might go against historical narratives students were more familiar with.

As established, the teachers taught primarily through primary, and sometimes tertiary, sources. Ms. Simpson shared that teaching through sources made her feel like she could step back from being the sole arbiter of truth saying,

I don't want everyone to be going like, "Oh, Ms. Simpson says." I want them to understand that we pull things from primary sources. I've got to be honest with you, Bonnie, I don't feel like I teach. I just give them stuff and I'm like, "Look at this and here's the questions that I have with it." I don't really do the teaching part most of the time. Really, I don't.

Ms. Simpson shared that teaching this way—through primary sources—took the pressure off her and guarded her against being accused of indoctrinating her students. While she maintained a significant degree of control over what sources students examined and how they interpreted them, focusing her instruction on primary sources provided a safety net in which Ms. Simpson could offload responsibility for challenging master narratives.

Mr. Morelli did the same thing as Ms. Simpson in using primary sources to deflect responsibility. However, he also had the added tool of using textbooks. AP courses cover a breadth of information and often require students to read AP-sanctioned textbooks to cover all the information that could appear on the exam. Like many other AP teachers, Mr. Morelli relied on an AP textbook to give students background information to contextualize their in-class source analysis. AP textbooks are known for being more liberal-leaning than state-level textbooks (Capuzzi Simon, 2016). Therefore, students were exposed to potentially challenging narratives in the textbook and sources. For example, white hostility and organized efforts to limit Black freedoms were present in the main text of the chapter on Reconstruction like when the text stated that “opponents of black rights were never completely excluded from power during Reconstruction. In September 1868, the white majority in the Georgia legislature voted to expel all 27 African-American representatives” (Fraser, 2015, pg. 466). Again, like Ms. Simpson, relying on the textbook and sources to convey riskier information allowed Mr. Morelli to deflect responsibility for teaching contentious social studies.

Finally, in their instruction, Mr. Morelli and Ms. Simpson referenced the omniscient “historian” when asserting a stance on a contentious issue. Mr. Morelli

referenced “historians” twice when looking at primary sources about Reconstruction, first saying,

How is Reconstruction going to go? Overall, a lot of historians argue it went poorly. A lot of historians argue that the U.S. missed a big chance to incorporate Black people into society and that they didn’t do that for a lot of reasons.

This comment was made at the end of class in reference to the textbook chapter students were going to read about Reconstruction. The intent was to clue students into how they were to frame Reconstruction before they learned about it.

Then later, when students began looking at Reconstruction primary sources, Mr. Morelli reminded them again how they were to frame their analysis, noting that,

There are many things that go wrong. There are 4 million slaves who are freed and must be reincorporated back into society. Many historians say that it failed. You will see this in your reading.

His reference to “historians” set the stance by which students were to frame their interpretation of Reconstruction. In referencing the vague “historians,” he was able to both legitimize the stance as well as distance himself from being the one taking it.

Ms. Simpson did the same thing. When talking with her students about their arguments regarding the cause of World War II, she relied on “historians” to legitimize the stance she wanted students to take and to communicate that she was not the one requiring them to take this stance. The first day she began teaching about the interwar years, she told students in her 5<sup>th</sup> hour the stance by which they would examine the documents and make their arguments, saying, “you can decide if you believe the treaty to

be just or unjust. But historians believe that this led to WWII.” Likewise, she did this with her 6<sup>th</sup> hour students when they were discussing the context for the sources they were analyzing, saying,

You're right that assassination contributed to the start of WWI, but we know—historians know—think about MAIN, we went over it now. We know this is the ongoing stuff that leads to World War I. Let's say you are Britain or France that you had colonies all over the world—is it easy to admit that you were wrong?

What is interesting about this instance is that Ms. Simpson begins by making a general statement (“we know...”) before switching to “historians.” This further suggests the usefulness of the omniscient “historians” because it shows a distinct choice to legitimize the stance she wants students to take while ensuring students know that that stance is not Ms. Simpson’s. Noting that “historians” are the ones who are setting this boundary, rather than Ms. Simpson, abdicates her from responsibility for the instructional choice to control how students analyze sources and construct arguments.

### **Summary**

While Mr. Morelli and Ms. Simpson maintained a large degree of control over their inquiry-based instruction to contain the risk of teaching contentious social studies, they simultaneously distanced themselves from the responsibility of their choices to engage in inquiry-based instruction featuring contentious social studies. Structurally, the teachers relied on standards and curriculum to recuse themselves from responsibility for choosing to teach lessons featuring historical narratives that might counter ones the community accepted. In their classrooms, the teachers emphasized sources and the omniscient “historian” to distance themselves from the choices around content to contain

their risk when engaging in lessons that featured contentious social studies. Ultimately, distancing themselves from their choices around contentious social studies made Mr. Morelli and Ms. Simpson feel safer in teaching riskier social studies because they felt they had an answer from an outside source in the event of parent or community pushback.

### **Chapter Summary**

After thoroughly analyzing the case study data—formal and informal interviews with the teachers, classroom observations, and instructional artifacts including lesson plans and student work—several themes emerged. I organized these themes into five findings about the teachers' choices around designing and delivering inquiry-based learning that featured contentious social studies. First, the learning environment drove student engagement with the inquiry-based lessons featuring contentious social studies. Second, they opted for smaller question, task, and source sequences rather than full inquiries containing all the IDM components. Third, the teachers slowed the progression through questions, tasks, and sources to better control the inquiry process. Fourth, the teachers privileged safety over openness in their inquiry-based lessons featuring contentious social studies. Finally, the teachers distanced themselves from contentious social studies through their instructional choices.

## **Chapter 5**

### **Discussion and Implications**

The main purpose of this study was to examine how two high school social studies teachers navigated the teaching of contentious social studies in their charged classrooms using inquiry-based lessons. I used a qualitative case study approach and focused specifically on two teachers in the same social studies department at a high school in a semi-rural district. Data collection consisted of pre- and post-observation semi-structured interviews, two weeks of observations of each teacher as they implemented inquiry-based lessons featuring self-identified contentious social studies, and the collection of instructional artifacts like curriculum materials and deidentified student work. I then analyzed the data using Corbin and Strauss's (2014) constant comparative method using a reflexive thematic approach (Terry & Hayfield, 2021) to conduct line-by-line coding and theme generation. The analysis was interactive and grounded in the analytic framework based on Swan, Grant, and Lee's (2018) theory of inquiry within the IDM and its emphasis on questions, tasks, and sources and Pace's (2021) framework for teaching controversial issues. In this chapter, I will expand on these findings by discussing how they speak to the current literature and their implications for the field. I will conclude with recommendations for future research.

The findings indicate that the teachers' instruction was impacted by the broader discussions around the purpose of social studies in ways that limited and narrowed their engagement with inquiry and equity-based social studies as they associated risk with certain elements of each. Specifically, the learning environment drove student engagement with the inquiry-based lessons featuring contentious social studies. The

teachers utilized their knowledge of the broader community to make instructional choices that allowed them to navigate the risks they saw in teaching contentious social studies. Ultimately, their knowledge of the community helped them control how students encountered contentious social studies. The teachers controlled the inquiry process by opting for smaller question, task, and source sequences rather than full inquiries containing all the IDM components and slowing down the progression through questions, tasks, and sources. Ultimately, they privileged safety over openness in their instructional design and implementation. Additionally, when they ventured into riskier content, they distanced themselves from their choices to feature contentious social studies by deflecting responsibility for including contentious content.

### **Outside Structures are a Safety Net**

While having prescribed structures in the form of standards and predesigned curriculum might be seen as limiting teacher autonomy and instructional choice in some scenarios, in this study, the structure aided the teachers as they navigated teaching contentious social studies. Outside structures, especially state-level social studies curriculum standards like the KASSS (2019) and national ones like the College Board (2015), drove and protected social studies instruction in a way that upheld inquiry and equity-based learning. Amid public conversations about the purpose of social studies, the teachers could point to the standards as justification for their instructional choices. Additionally, using vetted lessons and units like those produced by the College Board and the DBQ Project made the teachers feel safer in broaching contentious social studies in their lessons as they offered more control over the interpretation of primary sources. However, while the prescribed structures helped the teachers as they taught their units



featuring contentious social studies, they also acted as a boundary. The teachers were wary of including content not featured in the standards, which limited their engagement with equity-based social studies in their instruction.

### **Inquiry and Equity-based Standards are Important**

The KASSS (2019) is closely aligned with the C3 Framework, which centers inquiry in social studies curriculum and instruction. Incorporating inquiry-based practices into the state standard document supported teachers as they navigated teaching contentious social studies in their practice. First, it encouraged them to emphasize questions and source work in their instruction, and second, it legitimized the teachers' instructional practices around contentious social studies. Both aided the teachers' navigation of risk as they taught their units.

Kentucky's inquiry-based standards ask teachers to provide instruction that heavily features argumentation. Within the standards, argumentation is supported by skill work, in the form of the Inquiry Cycle's disciplinary concepts, and through source analysis, in the form of the Inquiry Cycle's emphasis on evidence. The teachers' emphasis on argumentation in their instruction, even if it came from controlled source analysis, made them feel like they were centering student autonomy regarding their curriculum and instruction. The ability to point to the questions and sources in their lessons as the instructional drivers made them feel safer when teaching contentious social studies because it followed the state standards and appeared to center student-driven inquiry. If challenged, the teachers and administrators used the standards to justify their instructional choices. Therefore, the Inquiry Arc in KASSS (2019) played a pivotal role in how teachers navigated teaching contentious social studies by encouraging inquiry-

based practices that the teachers then used as instructional buffers between the content and possible contention. However, while the Kentucky standards were structured around inquiry-based practices, this did not translate into teachers implementing student-led inquiry with fidelity. Implementing student-led inquiry, especially in the form of the IDM, requires teachers to give up a large amount of control. As control was vital to how the teachers navigated the real and perceived risks they associated with teaching contentious social studies, implementing student-led inquiry was difficult, if not impossible. Therefore, while the standards upheld inquiry-based instruction and aided the teachers as they navigated teaching contentious social studies, they did not translate into student-led inquiry or authentic implementation of the IDM.

Kentucky's social studies standards include some elements of equity-based social studies in their emphasis on multiple perspectives in both the source and skill work they require and the content they feature. However, they lack explicit connections to equity-based practices in the form of acknowledging the presence and impact of oppressive systems on past and present inequities. Although not a fatal flaw, as the standards are written to be broadly and flexibly applied, how the district and teachers viewed the role of the standards—as a boundary rather than a starting place—meant that they narrowed instructional practices when it came to equity. Teachers had to deviate from the standards if they wanted to include more equity-based content in their lessons. Deviating was inherently risky, as the culture in the school purported strict adherence to the standards and deviation was not supported. This limited the teachers' comfort level with including equity-based curriculum in their lessons because they lacked the support and justification found in the standards.

## **Accessible Instructional Materials are Important**

Constraints on the teachers' instruction limited their openness to using unvetted materials in their lessons. In addition to political pushback in the form of Senate Bill 1 and community pushback in the form of parent calls, the teachers faced many other challenges to implementing inquiry and equity-based lessons beyond their control. They had limited time to plan and deliver lessons and lacked sufficient professional development around the IDM and historical counter-narratives, limiting their ability to implement such lessons. These constraints led to teachers relying on premade and vetted lessons that were easy to implement in their classrooms. The teachers picked lessons that were straightforward in their alignment with their curriculum maps and were already adapted for classroom use. Lesson adaptations included source sets aligned around an argument, source comprehension and analysis questions, and scaffolding for argumentation. The teachers built upon the materials within the lessons I observed but did not significantly alter them. Therefore, what the lessons already contained was largely what was translated into the teachers' instruction. As the teachers did not have the time or the confidence to create their own materials, what they had access to was what they taught.

## **Deliberation is Difficult**

Inquiry-based learning calls on teachers to use deliberation and argumentation as the primary drivers of instruction, something easier said than done. Deliberation is an elusive and sometimes misunderstood concept in social studies curriculum and instruction design and implementation. Adding the challenges teachers face in a charged classroom further complicates and muddies the nature and role of deliberation in social

studies. The teachers used deliberation in their instruction but carefully narrowed student-led deliberation to maintain control over the trajectory of their arguments. Their emphasis on control elicits the question: At what point is deliberation not deliberative?

Additionally, concerns proposed in scholarship around the functionality of deliberation in equity-based social studies did not play out in the classrooms I observed. Rather, the teachers' awareness of the appropriate use of deliberation was heightened, resulting in their cautious use of the practice.

### **Defining Deliberation**

The teachers' implementation of deliberation in the lessons exhibited a passive understanding of what deliberation was and was not. I delineate between an active and passive understanding of deliberation because my observations indicated that the teachers were making choices around deliberation in reaction to a desire for control and safety rather than authentic deliberation. However, how the teachers structured deliberation in their lessons speaks to how we define deliberation in the field and how deliberation is complicated in a charged classroom.

Mr. Morelli and Ms. Simpson carefully ensured deliberation was never confused with a debate. Although structuring lessons around deliberative questions produces a climate in which there are multiple answers to the same question, all possible answers are correct depending on how students support their arguments with evidence. In contrast, a debate often assumes a correct or more correct answer and frames argumentation as competitive rather than an intellectual practice. The teachers carefully structured their lessons to encourage deliberation and discourage debate in writing their deliberative questions, how they guided source analysis, and how they structured class discussions.

Delineating between the two and emphasizing deliberation meant that they maintained more control over instruction. The predominant way the teachers were able to have more control over deliberation in their lessons was by confining it to an individual activity. Whereas debate is an external expression of an argument done in tandem with and against others, deliberation can occur both internally and communally. The teachers relied primarily on internal deliberation, where students read and analyzed sources and thought through their arguments largely on their own. This limited the possibility of students sharing unsupported claims with the whole class and eliminated the potential for students to argue with one another. In the lessons, if students did share with classmates, it was only after they had spent a significant amount of time internally deliberating how they might make their argument. Implementing deliberation in this way offered the teachers significant control over the deliberative process.

### **Adapting Deliberation**

Deliberation in Mr. Morelli and Ms. Simpson's classrooms was something that could be adapted to meet the needs and constraints of their classes. In their case, deliberation was narrowed to offer the teachers more control over student outcomes. As deliberation relies largely on how questions are framed, both teachers carefully framed the deliberative questions to ensure students were deliberating issues, not topics, by limiting the scope of the deliberative question (Hess, 2009; SPCL, 2018). They primarily did this by having students deliberate within an already framed argument and constructing arguments around the most significant factor. Although this produced questions that could be answered in multiple ways, it also limited student engagement with deliberation as students were not necessarily arriving at their own conclusion. In

observing how deliberation worked in Mr. Morelli's and Ms. Simpson's lessons, I noticed that the teachers were very aware of potential pitfalls in how students might answer deliberative questions and preferred to lose deliberation rather than allow too much space for answers that upheld injustices or oppression. This meant that their implementation of deliberation often lacked students deliberating the full issue.

Considering how Hess (2009) and the C3 Framework (NCSS, 2013) define deliberation within the context of civic life, reducing deliberation to this narrow scope begs the question of the authenticity of deliberation.

When teachers try to privilege safety over openness, deliberation, by its design, is not necessarily the best instructional practice. Teachers must manipulate the deliberation to ensure safety, but often that manipulation turns the practice into a prescribed argument rather than a student-constructed one. Scholars put forward that social studies should prepare students for engagement in civic life (Barton & Levstik, 2004; Westheimer & Kahn, 2004), yet how deliberation functioned in the classrooms I observed was connected less to civic life and more to historical analysis. Although this pedagogical approach resulted in instruction centered around argumentation, it did less to prepare students for the types of civic deliberation they will have as engaged citizens outside of school. Knowing how to construct an argument is insufficient when preparing students for civil discourse in a pluralistic society, especially considering how political polarization impacts societal interactions.

### **Challenges to Equity-based Social Studies were Avoided**

Scholars write about the challenges of teaching through deliberation when centering equity-based social studies. Gibson (2020) and Hlavacik and Krutka (2022)

speak directly to these challenges and offer solutions through counternarration and civic litigation. In Mr. Morelli and Ms. Simpson's classes, there was some evidence that they used the concept of counternarration to attend to power structures (notably in Mr. Morelli's lessons about Reconstruction, where he attempted to challenge the idea that American racism is a problem of the past), and no evidence that they employed civic litigation where they examined responsibility for issues of injustice (in fact, Ms. Simpson was very deliberate about students viewing antisemitism in Nazis Germany as a systemic problem and not the result of individual actors). The teachers largely avoided deliberation that would elicit the issues Gibson (2020) and Hlavacik and Krutka (2022) put forward in their work. Specifically, Gibson (2020) was concerned with how deliberation attended to power structures and promoted "finding common ground" (p. 432) in instances where common ground allowed for students to argue to uphold racial oppression. Hlavacik and Krutka (2022) similarly worried that deliberation allowed students to argue against upholding justice. Mr. Morelli and Ms. Simpson knew how deliberation could uphold oppression and injustice. They utilized their knowledge of the community to prevent themselves from structuring their lessons in a way that would allow space for either. Further, if the teachers felt deliberation would open space for upholding oppression or injustice, they switched their instructional practice away from deliberation rather than upholding either.

### **Teachers' Approaches were Nuanced**

The social and political context around the teachers and their classrooms made the interpretation of what constituted risk more nuanced and impacted how they approached teaching contentious social studies. Specifically, the teachers' attitudes and approaches to

teaching deliberative issues did not exclusively align with how Hess (2004) and Kitson and McCully (2005) and Pace (2021) interpreted them. The threshold for risk associated with teaching contentious social studies was lower than how scholars described (Hess, 2009; Kitson & McCully, 2005; Pace, 2021) because social studies content was in the process of “tipping” (Hess, 2009, p. 113) from being viewed as open or closed to deliberation. Additionally, deliberative practices were applied to social studies content beyond public policy issues with the C3 Framework’s (2013) and KASSS’s (2019) emphasis on argumentation throughout social studies instruction. Therefore, the teachers interpreted risk as going against how they perceived the community to view social studies content as settled or open to interpretation.

### **Teachers’ Approach to Contentious Social Studies**

Mr. Morelli and Ms. Simpson did not view themselves as teachers who made risky teaching choices intentionally. However, they saw the environment in which they taught as one that forced them into taking more risks because of public and political conversations about what should be taught in their classrooms. In her 2004 work, Hess categorizes teachers into four categories in their approach to controversial issues: those who deny, those who privilege, those who avoid, and those who balance. Although these categories speak to controversial issues, which are deliberative issues of public policy, the categories can be applied to how teachers approach teaching contentious social studies, which is social studies content (not just issues of public policy) that is in the process of tipping between being open or closed to deliberation. Due to this transition, teacher attitudes toward teaching contentious social studies are less fixed.



Rather than approach contentious social studies as one deliberative issue, the teachers considered them comprised of many parts that warranted differing approaches. Some of these parts were seen as deliberative, while others were settled. Therefore, the teachers' approach to deliberation changed throughout the lessons as they tried to balance having a classroom open to deliberation but safe from purporting oppressive or unjust views. For example, the teachers' attitude toward the overarching deliberative question guiding their inquiry-based lessons was one of balance. They wanted students to see multiple ways to make an argument addressing the question. However, as they built up toward the larger argument, the teachers denied, privileged, or avoided contentious social studies. At different moments in their instruction, the teachers denied that something was deliberative, often by stating how the content is interpreted by historians, thus arguing the content was settled and not open to deliberation even if some community members and politicians thought differently. They also privileged a particular perspective at other times in their selection of sources and use of source analysis questions. They used their curriculum design choices to frame how students could deliberate and construct their arguments around contentious social studies, thus privileging one interpretation over the other. Finally, if the teachers felt that content was too risky to broach in their lessons, they avoided approaching it in their curriculum design and instructional delivery. Often, what they chose to avoid were overt connections to partisan ideas that would have polarized their instruction. Each one of these choices helped protect the teachers from community pushback by controlling the risks they took in their instruction. Additionally, each choice was warranted in its context and contributed to instruction that was appropriately responsive to the classroom climate.

In addition to moving between different approaches throughout their lessons, what was considered a desirable approach changed. Teachers were not concerned with approaching contentious social studies through a balanced approach. They understood that if they were to approach their inquiry-based instruction featuring contentious social studies in that way, they would potentially set students up to argue both sides on an issue that does not warrant the consideration of both sides. Therefore, the teachers did not aim for a balanced approach to teaching contentious social studies. What they valued instead was an instructional experience that challenged students to view social studies content more analytically.

### **Contained risk is in the Eye of the Beholder**

Similar to how the teachers' attitudes towards contentious social studies were more nuanced than if they were teaching deliberative public issues, their approach to taking risks while teaching contentious social studies was more nuanced than Kitson and McCully's (2005) categories of avoiders, containers, and risk-takers and Pace's (2021) category of contained risk-taker. The two underlying assumptions in these categories are that risk-taking is desired and that teachers can choose to take or not take risks. In the case of Mr. Morelli and Ms. Simpson and the lessons that featured contentious social studies, taking risks and "push[ing] the boundaries" (Kitson & McCully, 2005, p. 4) was not desired because the teachers saw it as unsustainable and incompatible with their teaching because they worried it would result in the loss of their job. Additionally, due to the nature of contentious social studies, they often had to take risks because they felt they had a moral obligation to teach accurate history and therefore felt they did not have a choice to engage or not engage in risk taking.

Contained risk, in the context of this study, sometimes moved between the categories of containers and contained risk-takers. The teachers' instructional design utilized containment elements to take risks when teaching contentious social studies. Specifically, the teachers intentionally did not "link past to present" (Kitson & McCully, 2005, p. 4) and contained their lessons to historical events. They did this because they worried that connecting historical events to present injustices and inequities would cause pushback from students and community members about how the past impacted or parallels the present. Even without making connections clear, Mr. Morelli felt he was engaging in risk-taking behavior by clearly laying out how historical events catalyzed systemic racism, like when he taught about the failures of Reconstruction. Same with Ms. Simpson, who believed that her students would "get it" if she framed her lessons and explained her content clearly enough. Without knowledge of the national and local contexts around social studies curriculum and the unique ways they manifested in the community WCHS served, the teachers' behaviors could have appeared devoid of risk. Yet, the teachers shared that they thought about risk throughout their lessons and noted moments in the field notes where they felt they chose to take or contain risk. This suggests that the perception of risk is important in how teachers navigate teaching contentious social studies. Acknowledging their perception will help those supporting teachers—administrators, curriculum coaches, and teacher educators—better target their efforts in supporting teachers as they navigate teaching contentious social studies.

### **Implications**

This study suggests that, although Kentucky's Senate Bill 1 was not as extreme as the earlier versions, the culture and context around its passing impacted how teachers in

Kentucky design and deliver social studies curriculum. In response to the charged climate, teachers had to consider their choices carefully when implementing inquiry and equity-based social studies featuring contentious social studies. The social studies field has a pattern of periods of breakthroughs followed by pushback. The current era of pushback can show us how to better prepare pre-service teachers and support in-service teachers as they teach social studies in a polarized and charged society. What we learn from the current anti-critical race theory bills and polarization of social studies curriculum can be useful when pushback happens again. Specifically, teachers should be supported in their efforts to teach inquiry and equity-based social studies through course maps, standards, and resources. Teacher educators should prepare pre-service and support in-service teachers to navigate contention in their classrooms and focus on deliberation strategies that privilege safety. Finally, teacher educators should continue to help teachers bridge the gap between teacher understanding of the IDM and its implementation.

### **Set Teachers up for Success**

The teachers faced a series of challenges that made teaching inquiry and equity-based social studies difficult. Practically, they had limited time to design and prepare instruction, their instructional maps were crowded, and their time with students was often interrupted. Additionally, the resources they felt comfortable using in their classrooms were limited due to time constraints and their limited pedagogical expertise. The findings suggest that teachers need more support to successfully teach inquiry and equity-based social studies in the form of time and instructional materials.

Teaching inquiry and equity-based social studies requires time—time to design and time to deliver. Mr. Morelli and Ms. Simpson utilized the time within their lessons on

contentious social studies to allow space for students to process and analyze the sources that drove their instruction. Additionally, spending more time on the lessons allowed Mr. Morelli and Ms. Simpson to control the instruction so that their classroom was safer when students engaged in deliberation. However, the teachers knew that time was always scarce and that decisions to spend more time on the lessons I observed would cost them the opportunity to cover other issues later in the year. Their curriculum maps were demanding and left little time to attend to instruction featuring contentious social studies properly. Teachers could be better supported by giving them adequate instructional time to implement inquiry and equity-based instruction by reducing the content they must cover in their courses. This would allow teachers to spend the instructional time needed to facilitate inquiry-based learning that features multiple perspectives, challenges master narratives, and builds civic-mindedness. Further, Mr. Morelli and Ms. Simpson's emphasis on building toward more contentious social studies throughout the year was made more difficult by the lack of instructional time. For Mr. Morelli, teaching about the long-term impacts of Reconstruction necessitated him to be able to teach about 1950s American Society and the Civil Rights Movement. He shared that teaching about the 1950s and 1960s in his U.S. History classes is often difficult because he runs out of time at the end of the school year. Allowing for a broader interpretation of the KASSS to create course maps that meet the standards but are not bogged down in the details would allow teachers more time to implement meaningful instruction where students are using questions, tasks, and sources to inquiry about the past and how the past impacts the present.

Beyond the time constraints the teachers faced in their school day, they also had limited time to design instruction. Mr. Morelli and Ms. Simpson had a planning period, though it was often taken up with meetings. They, therefore, had to spend time after school designing instruction and preparing it for implementation. Their time after school was limited because Mr. Morelli had four classes to prepare for each day, and Ms. Simpson had two classes and was also a parent. Even if they were not designing their instructional materials, adapting premade materials for use in their classrooms took time. Therefore, the teachers favored materials that were more easily adapted for use in their classes than ones that required more work to align with their students' instructional needs. Especially regarding lessons on contentious social studies, the teachers were selective in their materials because they wanted to ensure deliberation was productive and safe. Emphasizing control over deliberation in their material choices resulted in them selecting resources more in line with dominant historical narratives and less open to equity-based social studies practices because those resources required less work to implement in their classrooms. The resources they picked came with modified and adapted sources, analysis questions, and scaffolds. This suggests that another way to support teachers and set them up for more successful implementation of inquiry and equity-based instruction is by designing resources that are ready for implementation, especially ones that feature contentious social studies. This means considering the content and skill needs found in traditional curriculum maps when creating resources, adapting and modifying sources for grade-level appropriateness, and creating scaffolds and organizers that support source analysis and deliberation. The teachers I observed expressed the desire to use more equity-based resources but were constrained by their

time limitations to adapt the resources for implementation. Taking out this barrier may help teachers center more inquiry and equity-based social studies by reducing the time it takes to get the resources classroom ready.

### **Provide Tools for Navigation**

Teachers must be prepared to navigate teaching inquiry and equity-based social studies in charged times through their teacher preparation programs and continuing professional development. The fight over the purpose of social studies is cyclical. Although teachers may not face the same pushback Mr. Morelli and Ms. Simpson experienced, understanding how to navigate a charged classroom will aid future teachers as they encounter pushback in their own classrooms. Teachers need tools to navigate teaching contentious social studies with inquiry-based instructional strategies. Specifically, teachers need to be given strategies to incorporate deliberation into their classrooms, as deliberation is foundational to inquiry-based social studies education but is increasingly difficult in charged classrooms.

When teaching contentious social studies, the teachers modified deliberation in their lessons to ensure deliberation did not provide space for oppression or injustice. Within their lessons, their modifications limited space for deliberation and heavily controlled the argumentation process. In doing this, their lessons lacked the authenticity of deliberating different interpretations of sources and crafting different arguments. Authentic and productive deliberation is essential for a democratic society to remain democratic but is extremely difficult to implement in classrooms. Classrooms are meant to be spaces free from harmful ideologies and rhetoric and are thus not open to the free market of ideas. Further, classrooms in public schools are often not homogenous, and

students bring with them a bevy of social, political, and economic backgrounds. Very few places exist like the public school classroom, where pluralism rules, so teachers must be prepared for how classroom deliberation functions differently than in wider society. Therefore, teachers must be taught how to balance authentic deliberation with safe deliberation. Finding this balance requires teachers to know how to frame their inquiry-based lessons (Entman, 2004; Swan et al., 2018). However, framing is difficult because it requires curriculum writers and teachers to select the ideological boundaries acceptable for deliberation. How are curriculum writers and teachers supposed to hedge in deliberation by setting boundaries while also using classroom deliberation as practice for being democratic citizens? As mentioned, some scholars have written about how to include deliberation in classrooms. Still, their solutions did not necessarily apply to Mr. Morelli and Ms. Simpson's classrooms, as their content was not based on critical theory. For these teachers, the following strategies were more helpful in creating authentic and safe deliberation: narrowing the issue to capture an issue safer to deliberate; widening the scope of deliberation to universalize the issue; placing the deliberation before or after the contentious topic rather than deliberating the topic; or deliberating the effectiveness of historians' arguments rather than asking students to deliberate in order to craft their own historical arguments. Teachers face these challenges in their classrooms and need support around defining and implementing deliberation for the classroom with their students. By discussing how teachers might address deliberation in a charged climate, teacher educators and curriculum coaches can better prepare and support teachers as they implement inquiry-based instruction.



## **Bridge the Gap**

Inquiry-based learning is something many think they do, yet few accomplish. Teachers may understand the theory behind it and incorporate components into their pedagogical practice. Still, there is a gap between knowing about inquiry-based social studies and implementing it. Teachers need opportunities to engage in professional development that emphasizes how to implement inquiry-based design and be given time to practice and reflect on their implementation. Specifically, teachers need more opportunities to learn how to implement the IDM in ways that attend to all three components—questions, tasks, and sources—so that they can engage in authentic inquiry.

Mr. Morelli and Ms. Simpson were both aware of the IDM and tried to implement inquiry-based practices in their lessons. However, they primarily implemented inquiry through questions and sources, with questions often functioning as scaffolds for source comprehension rather than analysis or deliberation, although analysis was present. After observing their implementation, I noticed that they struggled to conceptualize inquiry beyond questions and sources. This made their instruction more transactional because source analysis sometimes turned into a quiz with right and wrong answers rather than different ways of interpreting. This caused their lessons to be less student-led. Within their instruction, tasks—where students actively work with the questions and sources—were often missing. In the IDM, questions, tasks, and sources function as a three-legged stool holding up argumentation. Without one, student-led inquiry suffers. Often overlooked, the tasks are essential to students as they use compelling and supporting questions to analyze the sources. They provide space for scaffolding deliberation and engaging in skill work more explicitly, which helps teachers facilitate rather than drive

instruction. Without tasks, inquiry-based learning becomes less interactive and can resemble transactional learning in which the teacher asks students to answer questions correctly rather than deliberate ideas. Within the IDM, tasks are the most open to interpretation. Where compelling and supporting questions follow a clear logic—sources are clearly defined and supporting tasks typically feature argumentation—tasks are less defined because there are many options for implementation. Often, teachers replace tasks with answering supporting questions. While students can still construct arguments this way, they lose the experience of engaging with the sources methodically and intentionally. Teachers, even those familiar with designing instruction using the IDM, need help to bridge the gap between designing inquiry-based instruction and delivering it. The support they receive needs to be explicitly grounded in their practice so that they can practically conceptualize how the IDM functions in their lessons.

### **Suggestions for Further Research**

Further research is needed around teaching contentious social studies in charged classrooms to understand better how teachers navigate this terrain. This study indicates several areas for future research:

- the role administrators play in supporting teacher engagement with inquiry and equity-based instructional practices, especially when there is community pushback to such practices;
- how teachers conceptualize the role of deliberation in their classrooms and how their conceptualization impacts their implementation, especially when students deliberate about contentious social studies;

- the impact of teaching threshold concepts (Meyer & Land, 2006) in secondary social studies classrooms on student understanding of modern inequities;
- how teachers implement legislation calling on them to teach equity-based social studies, like Delaware's House Bill 198, which requires Black history to be taught in all schools.

In addition to the potential research studies listed above, the present study could be expanded upon by broadening its scope. At present, it focuses on two teachers in one high school in central Kentucky. Additional future studies that examine how social studies departments navigate designing and delivering inquiry and equity-based social studies that features contentious social studies and studies that replicate the present in different charged contexts could be valuable.

### **Conclusion**

This qualitative case study used an embedded, single case of two high school teachers teaching contentious social studies in a high school in a semi-rural Kentucky school district. It followed each teacher for two weeks as they designed and delivered lessons featuring contentious social studies and noted their choices to navigate the charged environment in which they taught. After analyzing data from formal and informal interviews, classroom observations, and instructional artifacts using thematic analysis, I found that the participants leaned into cultivating a learning environment that made inquiry-based instruction possible, that they heavily controlled how students engaged in inquiry-based practices through the choices they made as they designed and delivered instruction, and that the teachers distanced themselves from curricular choices that featured contentious social studies. The nature of case study research and the small

number of participants means that these findings are not generalizable and were not intended to be. However, these findings speak to how teachers are navigating the politicization of the social studies classroom by using standards and curriculum to safeguard their instructional choices, how they are rethinking and adapting deliberation to meet the challenges they see in their classroom, and how they perceive risk when teaching contentious social studies. This study suggests the need for future research around the implementation of inquiry and equity-based social studies curriculum and what is needed to make it successful.

## APPENDICES

### Appendix A: Pre-Observation Interview Protocol

#### Teaching Experience

- What is your teaching background?
- What is your experience with teaching contentious Social Studies issues?
- What is your experience with using the C3 Framework and Inquiry Design Model?

#### Current Culture around Social Studies Education

- How has the profession changed since you began teaching?
- How have conversations and legislation about the purpose of Social Studies impacted your teaching practice?

#### School Setting

- How would you describe your school's community?
- How would you describe the makeup of your students?

#### Curriculum Design

- When designing units and lessons to teach your students, what do you take into consideration based on the needs of your students?
- How do these factors change or remain the same if what you are teaching is contentious?
- How do these factors change or remain the same if you are teaching using the IDM?
- When designing the unit I will observe, what factors did you consider when designing for the needs of your students?

## **Appendix B: Post-Observation Interview Protocol, Mr. Morelli**

- In the first interview, you said you grew up in a conservative town but then identified as more liberal now. How did that transition happen?
- Why did you have me come to observe these lessons?
- What about them was contentious to you?
- Are there any modern-day parallels or connections in your lessons on Lincoln's views of slavery or Reconstruction?
- What did you hope students would take away from your lessons about Lincoln's views of slavery or Reconstruction?
- What moments did you take risks in your instruction to broach something contentious?
- Did you ever feel like you had to be careful with your words?
- How did your understanding of your students and their community impact what you choose to say and not say?
- How do you think not being from Washington County impacts your attitude toward teaching contentious issues?
- Having taught in another state and schools before Washington County, how is the experience similar and different?
- You said, "historians argue..." several times in your instruction. What was the point of this in those situations?
- You mentioned the idea of background knowledge as important before jumping into sources and questions. Explain that more.

- Why does background feel important to you as you teach topics like Lincoln or Reconstruction?
- I noticed you had a pattern of instruction: you preview the source, students work individually to analyze the source, they individually answer questions or write out their analysis, they share with a partner, then they share with the class. Finally, you offer closing remarks about the source. What were your reasons for structuring the discussion of sources in this way?
- You had class discussions, but they were controlled. Is this how you always do discussions? Why did you implement discussion this way during the lessons I observed?
- How do you select content to use in class?
- What other things did you look at, and why didn't you choose them?
- What else might you have done without limitations (time or AP standards)?
- I noticed that you added questions to the sources. Why?
- I noticed that you had to step back and have students turn a question into a yes/no question. Why?
- What is difficult about teaching argumentation and thesis statements?

### **Appendix C: Post-Observation Interview Protocol, Ms. Simpson**

- How do you select content to use in class?
- What other things did you look at, and why didn't you choose them?
- You originally talked about having me come while you taught about Stalin; why did you choose for me to come for the Treaty of Versailles lessons instead?
- Why did you have me come to observe these lessons?
- What about them was contentious to you?
- What moments did you take risks in your instruction to broach something contentious?
- Did you ever feel like you had to be careful with your words?
- How do you think being so involved in the community impacts your attitude toward teaching contentious issues?
- What did you hope students would take away from your lessons about the Treaty of Versailles and the rise of Hitler?
- You said, "historians argue..." several times in your instruction. What was the point of this in those situations?
- I noticed you had a pattern of instruction: students looked at a source and answered questions on their own, then shared out to the group, and then you shared concluding thoughts or more context for the source. What was the reason behind this pattern?
- If there hadn't been any questions along with the sources, would you have gone back and added them? Why or why not?



- You were diligent about having students slowly work their way through the sources. Why?
- Both you and Mr. Morelli had students gather background information before engaging in source work. What was the purpose of this?
- Why decide to have students write an essay for the Treaty of Versailles question and not the rise of Hitler?
- What is challenging about having students form their own thesis statements?
- Why did you amend the DBQ planning guide?
- There was a moment when you were teaching about the pogroms and violence against Jewish people that students started to laugh when thinking about all the different groups of people whom the SS targeted. Why was it important to you to intervene and redirect in that moment?
- I noticed that you tried to tie historical terms or events back to things students might see in their everyday lives (i.e. coal in Kentucky). Why did you do this?
- A student in 6th hour brought up Kanye West when you were talking about antisemitism. Why did you choose not to engage in conversation around him and his antisemitism?
- You brought up that Eugenics movements like what we saw in Nazis Germany also occurred in the United States. Why did you choose to bring this up?
- What else might you have done without limitations (time or standards)?

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## VITA

### Bonnie Patrice Lewis

#### Education

**Masters of Arts in Education**  
May 2016

University of Kentucky, Lexington, KY  
Area: Curriculum and Instruction  
Emphasis: Secondary Social Studies

**Bachelors of Arts in History**  
2010  
*Summa cum laude*

University of Kentucky, Lexington, KY  
Major Area: History  
Minor: Classics

#### Professional Experience

**2020-2023**

**Teaching Assistant**, Curriculum & Instruction, College of Education; University of Kentucky, Lexington, KY

**2020-2022**

**Managing Editor**, *C3 Teachers: College, Career, and Civic Life*, c3teachers.org, Companion website to the National Council for Social Studies' *College, Career, and Civic Life (c3) Framework for State Social Studies Standards*

**2016-2020**

**Social Studies Teacher**, Scott County Board of Education, Georgetown, KY

#### Awards and Honors

- Outstanding Teaching Assistant Award, nominee, 2022
- James S. Brown Award, 2022
- Invited member of the standards writing committee for the Kentucky Department of Education, 2022
- Invited Reviewer, *Middle Level Learning*, 2023-Present

#### Publications

- **Lewis, B., & Crowley, R.** (2022). If they were middle class and white': The possessive investment in whiteness in U.S. History textbooks' portrayal of 20th-century social democratic reforms (revise and resubmit at Theory and Research in Social Education).

- **Lewis, B.**, & Darolia, L. (2022) What do we lose when we ban books?: Problematic ideas versus freedom. *Social Education*.
- Swan, K., Crowley, R., Stamoulacatos, N., **Lewis, B.**, & Stringer, G. (2022). Countering the Past of Least Resistance: A Hard History Inquiry-Based Curriculum. *Social Education*, 86(1), 34-39.