

THE ARTIOS™ HOME COMPANION SERIES

Courage, Character & Consequences

THE CIVIL WAR TO THE PRESENT

High School

AUTHORS AND CONTRIBUTORS

LORI LANE

ALICIA PILLSBURY

JOHN MICHAEL LANE

ALYSHA MITCHELL

MARY E. HALL

JUDI PILLSBURY

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Please note: The articles compiled in this history text are from a variety of authors and do not always reflect the views or beliefs of Artios Academies. Although history should always be factual, it is recorded by humans who have opinions, beliefs and viewpoints that affect how they present material. We do our best to choose articles that best provide information, various worldviews for discussion, and as much accurate historical information as possible. However, there are times when an article may contain a statement that does not reflect our worldview or beliefs. When that occurs, our teachers do their best to discuss these items in class.

The Artios Home Companion Series

Curriculum Preface

Welcome to The Artios Home Companion Series! The curriculum and resources contained in The Artios Home Companion Series are the same as those which we use in our accredited academic program at our Artios Academies locations. Thus, you can be assured that it is a quality curriculum. However, The Artios Home Companion Series goes far beyond the normal tendency to promote retention of facts and random pieces of information. The developers of this series know that a child is not educated simply because he or she has completed a particular curriculum or logged a certain number of hours. From God's viewpoint, "educated" is something you become.

As home educators, many of us desire to give our children a Biblical education, grounded on Biblical principles. Many home educators apply Biblical principles to WHAT is taught, but it is also important to apply Biblical principles to HOW the subject is taught. The reality is that many of us were educated in a system that had priorities, principles, and philosophies that, at their very core, were non-Biblical — or even worse, diametrically opposed to a Biblical philosophy of education. Yet, we want to educate our children differently.

As a mom who home-educated her children for 23 years and as a teacher of hundreds of home-educated students for more than 25 years, my search and study for a Biblical approach to education, one that goes beyond just random facts and information, has been an ongoing journey. In many instances, I found myself learning right alongside my own children while retraining my thoughts, approaches, and methodology to fit what I saw in Scripture. I often wished that I could just buy one complete curriculum and be done with it. However, my heart told me that to meet the needs of each of my children individually, I needed to put much thought, prayer, and research into pulling together a unique curriculum that adapted to each of them. It was difficult and time-consuming to pull together pieces from various sources, knowing what to include and what to leave out.

Then, after going through this laborious process, it was even more daunting to realize the REAL work hadn't even begun. With materials selected and lesson plans ready, my work was just beginning. When it was time to execute the plan, I would need to be available to find those teachable "heart" moments with my children that would educate and stimulate so much more than just the mind. My goal with each of my children has been to graduate a well-rounded, heart-instructed student, who knows the source of real knowledge and wisdom.

As my husband John and I began to envision how a Biblical approach to education would play out in our personal lives, in the lives of each of our children, and then in the life of our family, several key and core values began to surface. These core values formed a firm foundation upon which to build our lives and our family. They don't reflect methodology. Instead, they reflect a foundation upon which to base methodology. These values, in and of themselves, don't describe what we do. Instead, they reflect the foundation upon which we make strategic choices in fulfilling what God has called us to do.

In a sense, these core values represented our worldview of education. "Christianity Today" defines worldview as follows:

- A set of presuppositions (assumptions which may be true, partially true, or entirely false) which we hold (consciously or subconsciously, consistently or inconsistently) about the basic makeup of our world.
- More simply put, *worldview* refers to is the sum total of what we believe about the most important issues of life.¹

As we began home educating our children, we discussed what we felt were our God-given responsibilities and priorities in raising our children. The attempt to define and verbalize these priorities

has been an ongoing process. However, I assure you that without these priorities, or when we lose sight of them, we are greatly tempted to make decisions based on fear, peer pressure, tradition, or many other ungodly influences.

Throughout The Artios Home Companion curriculum, the choice of eclectic resources, the application of truths, the choice of emphasis, and the leading ideas emphasized all reflect these core values. During the development of The Artios Home Companion, we have tried to apply a Biblical worldview and the core values that have appeared throughout our study of Scripture. It is our prayer that this curriculum will be of great help to those parents wishing to reflect these core values to their own children and will save them the time of pulling together a myriad of resources.

What are these core values?

- God’s Word reigns supreme and is the guiding force behind our thoughts and actions in every area of life.
- The heart is the focus of spiritual growth.
- God created man as multi-faceted and unique individuals.
- God’s Word “equips” the children of God.
- Our lives and choices should reflect God’s character to those around us.
- The family is a God-ordained institution through which the next generation is nurtured and disciplined.

Let’s take a look at each of these core values in more depth.

God’s Word reigns supreme and is the guiding force behind our thoughts and actions in every area of life.

God’s Word speaks to the issues that we face including questions regarding the origin of the world, marriage, friends, entertainment, government, economics, and yes, even education. Because of this, God’s Word and the principles found therein should be pointed out and emphasized in those “teachable moments” found in every academic and arts related topic and in every situation that we face as we “walk along the way” with our students. It is not enough to throw Scripture at a particular topic in arts and academics. Our goal should be to begin and end our study of each subject with God’s Word as the foundation and the lens through which we view it.

1 Timothy 3:16 and 17 states this very plainly when it says, “All Scripture is breathed out by God and profitable for teaching, for reproof, for correction, and for training in righteousness, that the man of God may be complete, equipped for every good work.” In the Greek, this is the only instance of the word “Artios” appearing and it means: competent, equipped, thoroughly prepared. Isn’t that what we want for our children? We want them to be competent, equipped, and prepared for whatever God has for them and for whatever the future holds. The answer to making sure they are equipped is not found in the perfect curriculum, the perfect methodology, or the perfect teacher. The source for equipping our children is God’s Word. If we believe this to be true, Scripture must reign in every aspect of life, instruction, and education. This belief should motivate us to ponder and consider the influence (or lack thereof) of God’s Word in every academic and artistic subject.

In 2 Peter 1, Peter talks about the power of Scripture as including “all things that pertain to life and godliness.” Thus, a Christian’s worldview, including his approach to education, is to be based on Biblical truth. To hurry through those teachable moments and opportunities, or to fail to see opportunities to teach our students how to apply God’s truth as the guiding force behind their lives, is to miss a vital aspect of a truly Biblical approach to education. I love how Paul states this in I Corinthians 2:12-16 when he says, “Now we have received not the spirit of the world, but the Spirit who is from God, that we might understand the things freely given us by God. And we impart this in words not taught by human wisdom but taught by

the Spirit, interpreting spiritual truths to those who are spiritual. The natural person does not accept the things of the Spirit of God, for they are folly to him, and he is not able to understand them because they are spiritually discerned. The spiritual person judges all things, but is himself to be judged by no one. ‘For who has understood the mind of the Lord so as to instruct him?’ But we have the mind of Christ.”

As I have journeyed through a study of Scripture to find what God says about the education of my children, I have realized time and time again that my thinking was “off” from what Scripture said was to be my priority. Colossians 2:8 gives a charge that many of us should take to heart: “See to it that no one takes you captive by philosophy and empty deceit, according to human tradition, according to the elemental spirits of the world, and not according to Christ.”

Many times, in the area of education, I have found myself influenced by a leader’s personality, by peer-pressure, by friends, by fear, and by tradition. If my number-one core value and the guiding force behind my thoughts and actions in every area of life is that God’s Word reigns supreme, then that should apply to my approach and to my priorities in the education of my children. It is to Scripture that I should first turn when making decisions in this and every area of my life.

In developing this curriculum, one of our goals has been to assist you in educating and equipping your children by providing you with a framework and specific help in finding those teachable moments, those times when God’s Word can be applied to the topic at hand, so that amazing discussion and interaction can take place between you and your child as you “teach them in the way.”

The heart is the focus of spiritual growth.

For a Christian educator, our primary focus should always be the instruction of the heart. Noah Webster, in his 1828 dictionary, defines the word heart as “the seat of affections and passions as of love, joy, grief, enmity, courage, pleasure.” He defines “educate” in this way: “to bring up, as of a child; to instruct; to inform and enlighten the understanding; to instill into the mind principles of arts, science, morals, religion, and behavior. To educate children well is one of the most important duties of parents and guardians.”

The heart is referred to hundreds of times throughout Scripture and its mention can be put into the following categories defined by Ruth Beechik, author of *Heart and Mind*: thought, emotion, motive, physical, spiritual, moral, general or a combination of these. We instruct the heart of our students thoroughly and diligently. Deuteronomy 6:6-7 says “And these words that I command you today shall be on your heart. You shall teach them diligently to your children, and shall talk of them when you sit in your house, and when you walk by the way, and when you lie down, and when you rise.”

When we focus on the instruction of the heart, those things that we find important in education and in outward performance and appearance are forever altered. Although it is a noble aspiration to have your children do well in school, it is not a supreme priority. Although it is a noble aspiration to have them achieve high honors in various areas of life, it is not a supreme priority. It is not enough to focus on outward performance and conformity, our goal should be the instruction of our child’s heart. We must remember that the “fear of the Lord is the beginning of wisdom” — a wisdom that is much more than a head knowledge, but rather leads to a heart change.

Throughout this curriculum we have tried to find opportunities to assist you, not only with teaching the academic subjects, but by pointing out those times when instruction of the heart is vital. The study of history, literature, science, the arts and more, provides ample opportunities to demonstrate “heart matters” to our children.

God created man as multi-faceted and unique individuals.

Many of us have been educated in a secular system or perhaps private schools in which a secular philosophy of education has become prevalent. A secular philosophy of education views a student as a

wonderful and complex human organism just waiting to be filled by a learning process that is measured simply by the retention of facts and information.

In contrast, a Biblical view of education views education and learning as a personal process that not only involves a student’s heart, but also his soul and mind. With this view, education can be measured by wisdom, understanding, and a knowledge of the truth. Our children should be seen as “whole” and unique individuals whose whole being should be addressed through the process we call education.

Thus, our instructional approach throughout The Artios Home Companion Series is to implement a creative and integrative approach to learning. Just as each individual is unique and multi-faceted, life, in and of itself, is also multi-faceted. When a student cannot understand how his subject matter interacts with real life, or with other aspects of study, the motivation and enthusiasm for learning will not be as strong as it could be. When students realize that what they are studying is not alienated from other subjects or from real life, there is a mental and emotional engagement. This where real progress begins.

Our subjects are integrated, not only by time period, but also by theme and emphasis, which will be referred to throughout the curriculum as “Leading Ideas.”

Not only is our approach to content and instruction creative, integrative, and multi-faceted, but throughout The Artios Home Companion Series, the learning activities and assessments are also creative, integrative, and multi-faceted, addressing various types of learning styles and teaching personalities.

Last but not least, if you are teaching children of various ages within your home, we have integrated weekly topics at the appropriate age development level, to allow for more family interaction, study, and discussion. This integration avoids having each student studying something different and the teacher (that’s you), being pulled in numerous different directions.

God’s Word “equips” the children of God.

While traveling this 23-year journey of home education, I came across a book called *The Noah Plan* from The Foundation for American Education. Within that book, the authors contrast two historic worldviews of education. When we say that we have as a core value the fact that God’s Word “equips” the children of God, it is important to define the word “equip.” To many the word “equip” applies only to areas of knowledge, academic competence, usefulness in society, and the ability to produce. However, the philosophy that I found within this valuable resource, *The Noah Plan*, contrasted two very different views of someone who is “equipped” or “educated.”

The authors contrasted a Hebrew mindset of education with a Greek mindset of education. I have included their chart:

	Hebrew Mindset	Greek Mindset
Education Begins:	Knowledge of God	Knowledge of Man
Essential Quality:	Holiness of God	Transference of Knowledge
Education is for:	All the people	Wealthy and leisure classes
Education is to develop:	The whole person	Aptitudes and talents
Why Learn:	To revere God	To comprehend
Object of Education:	To know God and submit to the authority of His Word	To know thyself

While a knowledge of man, a transference of knowledge, a knowledge of oneself, the ability to comprehend, and the development of specific aptitudes and talents may be important, do you notice the difference in focus between the two columns? One column focuses on man, the other on God.

A few years ago, I wrote a book titled: *Beginning With the End in Mind*, which is basically a study of 2 Peter 1 and its application to various areas of our lives. In no uncertain terms, Peter tells us that our two supreme priorities as Christians are to know God and to grow to become more like Him. If we “begin with the end in mind” in education, with a focus on what God says is most important, then our approach and priorities in education will be transformed.

Our lives and choices should reflect God’s character to those around us.

The study of history based on the lives and characters of individuals provides a superb means by which our focus on God’s character helps us discern the ways in which the lives of significant historical figures did or did not portray true reflections of their Creator. It has been said that the study of history should prevent us from repeating the mistakes of the past. However, it is one thing to study history. It is a completely different approach to study history through the study of individuals, to study the arts through the lens of historical events and their influences, and to study literature as a reflection of the time in which it was written. By studying these subjects and others in an integrative method, not only are the subjects themselves given new meaning in the lives and minds of our children, but these individuals, events, actions, and products are all shown to be related. “No man is an island,” and nothing could show this fact to be more true than the study of subjects in an integrative and creative format.

It is all too common to study subjects in isolated and mindless file folders of information, never taking the time to show our students how life and LIVES interact with one another. As children of the Most High God, we are to be a reflection of God to the world around us. But often we think that our actions and our choices make little difference in the grand scheme of things. Nothing could be further from the truth. Our lives have the ability to influence for good or for evil, for positive action or for negative apathy. Studying history, literature, the arts, and other subjects as they relate to each other helps students develop an integrated way of thinking and reasoning. On a spiritual level, it helps them see their own lives as a reflection of God in their unique spheres of influence.

The family is a God-ordained institution through which the next generation is nurtured and disciplined.

The family is God’s first institution shown in Scripture, and by the very nature that it was created by God as a reflection of Christ and His church, it has important meaning and an aspect of holiness and sanctity. Yet, each family is made up of individuals. Because of that, there are many variables in our approach to educating our children as individuals.

It is our hope and prayer that The Artios Home Companion Series will be able to literally come alongside you and assist you in your role as the God-ordained institution through which the next generation is nurtured and disciplined. We hope that you will find contained within the pages of these resources the structure, guidance, and flexibility needed to approach the students within your family as individuals, all while you move together as a family unit to bring honor and glory to the One of whom we are to be a picture.

1. *Exploring Christianity - Truth*, <http://www.christianity.co.nz/truth2.htm>

The Artios Home Companion Series

Curriculum Details

It has been said that methodology is nothing more than applied philosophy. All the core values I previously mentioned are now put into practical application through the logistics, choices, and options found within The Artios Home Companion Series. Each unit is divided into a teacher overview and one or more student lessons. For families with students at multiple grade levels, each level within the curriculum is color coded: elementary, middle school, and high school.

Unit Overview

At the beginning of each unit, you will find a unit overview for you as the adult. On this page you will find several important main headings: Topic Overview; Assignments and Activities; Key People, Places, and Events; Leading Ideas; and in some lessons, Vocabulary.

At the start of each unit, it will be important for you to read through this overview. The information contained in this section will give you insight into the objectives for each unit. It will give you a broad overview of what you will be studying with your child throughout the unit and the emphasis suggested by The Artios Home Companion Series. Although middle school and high school students are becoming more independent than their elementary counterparts, it is still important to stay abreast of what your student is studying even at these ages so that you are able to hold them accountable and keep them moving forward through the material and so that you can use the leading ideas and discussion questions as launching pads for discussions that lead to the discipleship of your children as you teach them “along the way.”

Student Notebook

It is highly recommended that elementary and middle school students learn to set up a notebook based on their studies in The Artios Home Companion Series. This sets a wonderful foundation for the 4 R’s of Research, Reason, Relate, and Record. You and your child’s classroom teacher will determine the best means of organizing this notebook.

At the high school level, it is vitally important for students to conquer the skill of organization and to learn to set up a notebook of their own. These skills are crucial for college level study in the future. This information will also prove useful on the college level when your student is asked to do research on a particular topic. At that point that your student will find this notebook an especially useful resource.

- History Section: In the case of history, the notebook serves as a great resource for portfolio review and a content-driven history timeline. This notebook can be set up based on the chronological sequence of the units contained in the curriculum, with a divider for each unit, or it can be divided into seven week sections, or even one long line of notebook information. However you choose to use this notebook approach, be sure to place the information in the notebook in the order in which it is presented in the curriculum.
- Literature Section: This section should be broken down by book studied and contain information on the author, plot, literary elements, etc. as they pertain to each literary piece studied.
- Vocabulary Section: Last but not least, in both history and literature the student will be exposed to new vocabulary.

Lesson Contents

Teacher Overview:	This section contains an overview of that unit’s topic.
Assignments and Activities:	Suggested reading, activities, and resources that correlate with the unit’s topic and emphasis are included in this section. For elementary and middle school students, the assigned selection can be read aloud or independently, depending on the level and learning style of the student. For high school students, the assigned reading can be read independently, but during a week of a particularly difficult topic or section of reading, the parent should be available for questions and discussion.
Leading Ideas:	These are ideas, principles, and lessons that can be taught based on the information contained in the unit and then reinforced through teachable moments and various activities. These principles are supported by Scripture that can be memorized to affirm this learning.
Key People, Places, and Events:	A list of important people, places, and events are given to which your student should give special attention. The first significant instance of each of these in a lesson will be in a bold font.
Discussion Questions:	It is suggested that following the reading for the day, the student “narrate” the information that has been read. At the elementary level, this can be done orally or in written form using one of the notebook pages provided for in the curriculum. Discussion questions serve as a guide to discern what information should be emphasized in that narration process. At the middle school and high school levels the student should “narrate” in written form the information that has been read, including the answers to any discussion questions.
Vocabulary:	In some lessons, vocabulary words will be listed. These should be written down and a contextual or researched definition written out as well. It is suggested that these be written in a separate divider section of the student’s notebook and that one letter of the alphabet be assigned to each page. The first significant instance of each of these in a unit will be in a bold font.
Articles:	These present one of our many opportunities as Christian parents and teachers to help students develop discernment. Some articles may present the myths and beliefs of various cultures and time periods. At times, those beliefs are presented within the articles as though they were true (i.e., Greek and Roman Mythology). Please help your students to recognize those things that stand opposed to God’s Truth as you go through each lesson together, and contrast those beliefs with the Christian doctrines of monotheism and salvation by grace through faith.
Special Study:	Sometimes a student’s interest or curiosity will be piqued by a particular person or event in history. Don’t miss this opportunity to flex with the interest of your student. The Artios Home Companion Series provides suggested activities and a schedule outline. However, this should never be considered a constricting resource but rather a jumping-off point for interest-driven adventures!

Learning Styles:

Each unit contains main assignments and suggested activities. However, you may want to mix up activity types from time to time. This way, you will find some optional or substitute activities that you can use with your student to assess or reinforce their learning along the way. These activities are made up of learning-style-specific activities designed to specifically target different types of learners.

Websites:

Some units list websites and videos for a parent or student to access, either for suggested assignments or additional resources. These are included on our HCS Class pages, and a list of the websites and videos that are suggested for assignments is also included in the Appendix of this book. Because of the dynamic nature of the Internet, any web addresses or links contained in this volume may have changed since publication and may no longer be valid. As we become aware of these, we will attempt to find replacements and list them on our website. If a web link won't open a web page by clicking the link, try typing the URL into a web browser. **Note:** *The articles, websites, and videos selected for this curriculum represent a wide variety of artistic and teaching styles in order to provide students with familiarity with more than a single style for conveying information. Also, while we benefit from the research involved in the production of each one, please be aware that some information presented within them, or values espoused by their producers, may not be fully accurate or in agreement with Christian values. Please always be discerning while teaching.*

Unit	History	Language Arts ~ L.A. Page 1
1	EL: Heading Toward Civil War MS: Foreshadowing America's Civil War HS: Prelude to the American Civil War 13	EL: <i>Freedom Train: Story of Harriet Tubman</i> , Dorothy Sterling MS: Poetry of the Modern Time Period: Edgar Allen Poe HS: Poetry of the Modern Time Period: John Keats L.A. Page 3
2	EL: America Goes to War Against Itself MS: Conflict Flares Up Into Civil War HS: Conflict Erupts Into Civil War 29	EL: <i>Freedom Train: Story of Harriet Tubman</i> , Dorothy Sterling MS: Poetry of the Modern Time Period: Lewis Carrol HS: Poetry of the Modern Time Period: Edgar Allen Poe L.A. Page 5
3	EL: The Civil War Heats Up MS: The Civil War Through Gettysburg HS: America's Civil War Intensifies 44	EL: <i>Freedom Train: Story of Harriet Tubman</i> , Dorothy Sterling MS: Poetry of the Modern Time Period: Robert Frost HS: Poetry of the Modern Time Period: Henry Wadsworth Longfellow L.A. Page 6
4	EL: The Civil War Shifts Direction MS: The Civil War Through 1864 HS: The Civil War Rages On 60	EL: <i>Freedom Train: Story of Harriet Tubman</i> , Dorothy Sterling MS: Poetry of the Modern Time Period: Shel Silverstein HS: Poetry of the Modern Time Period: Gerald Manley Hopkins L.A. Page 8
5	EL: The Civil War Comes to an End MS: The End and Results of America's Civil War HS: The War's End and Its Aftermath 72	EL: <i>The Root Cellar</i> , Janet Lunn MS: <i>Across Five Aprils</i> , Irene Hunt HS: <i>Uncle Tom's Cabin</i> , Harriett Beecher Stowe L.A. Page 11
6	EL: Binding Up the Nation's Wounds MS: Moving Forward After Civil War HS: Reconstruction and Postwar Advancements 87	EL: <i>The Root Cellar</i> , Janet Lunn MS: <i>Across Five Aprils</i> , Irene Hunt HS: <i>Uncle Tom's Cabin</i> , Harriett Beecher Stowe L.A. Page 13
7	EL: Industries and the West MS: Industries and the American West HS: Industries and the Great American West 108	EL: <i>The Root Cellar</i> , Janet Lunn MS: <i>Across Five Aprils</i> , Irene Hunt HS: <i>Uncle Tom's Cabin</i> , Harriett Beecher Stowe L.A. Page 13

Unit	History	Literature
8	EL: The Gilded Age MS: The Gilded Age in America HS: America's Gilded Age 125	EL: <i>The Root Cellar</i> , Janet Lunn MS: <i>Across Five Aprils</i> , Irene Hunt HS: <i>Uncle Tom's Cabin</i> , Harriett Beecher Stowe L.A. Page 14
9	EL: America - A World Power MS: A Changing World HS: America Becomes a World Power ... 141	EL: <i>The Root Cellar</i> , Janet Lunn MS: <i>Across Five Aprils</i> , Irene Hunt HS: <i>Uncle Tom's Cabin</i> , Harriett Beecher Stowe L.A. Page 14
10	EL: Start of the Twentieth Century MS: The Twentieth Century Begins HS: Dawn of the Twentieth Century 155	EL: <i>The Singing Tree</i> , Kate Seredy MS: <i>Peter Pan</i> , J.M. Barrie HS: <i>A Doll's House</i> , Henrik Ibsen L.A. Page 15
11	EL: Reform in America MS: American Spirit of Reform HS: The Spirit of Reform in America 173	EL: <i>The Singing Tree</i> , Kate Seredy MS: <i>Peter Pan</i> , J.M. Barrie HS: <i>A Doll's House</i> , Henrik Ibsen L.A. Page 16
12	EL: Labor Troubles MS: Labor Relations HS: Industrial Democracy 184	EL: <i>The Singing Tree</i> , Kate Seredy MS: <i>Peter Pan</i> , J.M. Barrie HS: <i>A Doll's House</i> , Henrik Ibsen L.A. Page 17
13	EL: President Wilson and the Start of the Great War MS: The World Goes to War HS: Wilson and the Start of World War I 195	EL: <i>The Singing Tree</i> , Kate Seredy MS: <i>Peter Pan</i> , J.M. Barrie HS: <i>A Doll's House</i> , Henrik Ibsen L.A. Page 17
14	EL: America Enters the Great War MS: America in the First World War HS: America Enters World War I 211	EL: <i>The Singing Tree</i> , Kate Seredy MS: <i>Peter Pan</i> , J.M. Barrie HS: <i>A Doll's House</i> , Henrik Ibsen L.A. Page 18
15	EL: After the War MS: Worldwide Struggles After the War HS: Aftermath of World War I 224	EL: <i>Bud, Not Buddy</i> , Christopher Paul Curtis MS: <i>My Brother's Shadow</i> , Monika Schroeder HS: <i>Animal Farm</i> , George Orwell L.A. Page 19

Unit	History	Literature
16	EL: The Roaring Twenties MS: The “Roaring Twenties” HS: The Decade That Roared 243	EL: <i>Bud, Not Buddy</i> , Christopher Paul Curtis MS: <i>My Brother’s Shadow</i> , Monika Schroeder HS: <i>Animal Farm</i> , George Orwell L.A. Page 21
17	EL: Down and Out – the Depression MS: The Great Depression Era HS: The Great Depression 264	EL: <i>Bud, Not Buddy</i> , Christopher Paul Curtis MS: <i>My Brother’s Shadow</i> , Monika Schroeder HS: <i>Animal Farm</i> , George Orwell L.A. Page 21
18	EL: The Roosevelts MS: FDR and the New Deal HS: The Roosevelt Era 282	EL: <i>Bud, Not Buddy</i> , Christopher Paul Curtis MS: <i>My Brother’s Shadow</i> , Monika Schroeder HS: <i>Animal Farm</i> , George Orwell L.A. Page 21
19	EL: The Start World War Two MS: The Second World War Begins HS: World War II Begins 299	EL: <i>Bud, Not Buddy</i> , Christopher Paul Curtis MS: <i>My Brother’s Shadow</i> , Monika Schroeder HS: Works of Poetry from WWI and Speeches from WWII L.A. Page 22
20	EL: From War’s End Into the Cold War MS: From WWII Into the Cold War HS: War’s End and Start of the Cold War Era 328	EL: <i>Number the Stars</i> , Lois Lowry MS: <i>Diary of a Young Girl</i> , Anne Frank HS: Works of Poetry from WWI and Speeches from WWII L.A. Page 23
21	EL: The Cold War Years MS: The Cold War Era HS: The Cold War Era Continues 351	EL: <i>Number the Stars</i> , Lois Lowry MS: <i>Diary of a Young Girl</i> , Anne Frank HS: Works of Poetry from WWI and Speeches from WWII L.A. Page 24
22	EL: The Civil Rights Movement – Part One MS: The Civil Rights Movement – Part One HS: The Civil Rights Movement – Part One 376	EL: <i>Number the Stars</i> , Lois Lowry MS: <i>Diary of a Young Girl</i> , Anne Frank HS: Works of Poetry from WWI and Speeches from WWII L.A. Page 25
23	EL: The Civil Rights Movement – Part Two MS: The Civil Rights Movement – Part Two HS: The Civil Rights Movement – Part Two 385	EL: <i>Number the Stars</i> , Lois Lowry MS: <i>Diary of a Young Girl</i> , Anne Frank HS: Works of Poetry from WWI and Speeches from WWII L.A. Page 26

Unit	History	Literature
24	EL: The Wars in Indochina MS: The Cold War Heats Up in Indochina HS: The Indochina Wars 395	EL: <i>Number the Stars</i> , Lois Lowry MS: <i>Diary of a Young Girl</i> , Anne Frank HS: Works of Poetry from WWI and Speeches from WWII L.A. Page 26
25	EL: Passing the Torch MS: From Kennedy to Nixon HS: The Kennedy, Johnson, and Nixon Years 402	EL: <i>My Side of the Mountain</i> , Jean George MS: <i>A Wrinkle in Time</i> , Madeleine L'Engle HS: <i>Out of the Silent Planet</i> , C.S. Lewis L.A. Page 27
26	EL: The Stormy Seventies MS: From Ford to Carter HS: The Ford and Carter Years 417	EL: <i>My Side of the Mountain</i> , Jean George MS: <i>A Wrinkle in Time</i> , Madeleine L'Engle HS: <i>Out of the Silent Planet</i> , C.S. Lewis L.A. Page 28
27	EL: The Energetic Eighties MS: From Reagan to George H.W. Bush HS: The Reagan and Bush 41 Years 423	EL: <i>My Side of the Mountain</i> , Jean George MS: <i>A Wrinkle in Time</i> , Madeleine L'Engle HS: <i>Out of the Silent Planet</i> , C.S. Lewis L.A. Page 29
28	EL: Toward a New Millennium MS: End of a Millennium HS: Advent of a New Millennium 436	EL: <i>My Side of the Mountain</i> , Jean George MS: <i>A Wrinkle in Time</i> , Madeleine L'Engle HS: <i>Out of the Silent Planet</i> , C.S. Lewis L.A. Page 29
29	EL: A New Millennium Begins MS: Start of a New Millennium HS: The New Millennium Begins 449	
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The Artios Home Companion Series

Unit 1: Prelude to the American Civil War

Teacher Overview

DURING THE FIRST HALF of the nineteenth century, the young nation of America underwent vast expansion, fast population growth, and fascinating development in the areas of education, publishing, inventions, communication, and travel, as well as tremendous cultural change. Meanwhile, the rest of the world experienced tumultuous periods of unrest as various national governments and ethnic groups battled each other for supremacy and independence. This unit will provide a reviewing look these events to help develop our understanding of the trends that led to America's Civil War and the modern era that followed.



The interior of the Crystal Palace in London during the Great Exhibition of 1851.
Colored lithograph by J. McNeven (1851)

Suggested Assignments

In this unit, students will:

- Complete three lessons in which they will review **nineteenth century growth and cultural change in the United States, worldwide struggles for supremacy and independence, and the early struggles for women's rights in America**, journaling and answering discussion questions as they read.

Note: Many of the readings in the lessons of this volume have been supplemented with text boxes that contain updated or additional information not included by the articles' original authors.

- Define vocabulary words.
- Do some additional research and prepare to discuss a nineteenth-century writer.
- Find and read a copy of Tennyson's poem "The Charge of the Light Brigade."
- Do some brief research on **Florence Nightingale** and her exemplary medical work during the Crimean War and prepare to share their findings.

- Throughout this course students will be asked to complete biography notebook pages. They are to do a small amount of outside research (if needed after completing the lesson’s readings), and then write up a biographical page on the subject. They will add this and later biography pages to the appropriate unit’s section in their history notebook. In this unit they will write biography notebook pages on **one of the women** discussed in Lessons Two and Three.
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Idea

The Bible provides the ethics by which to judge people and nations.

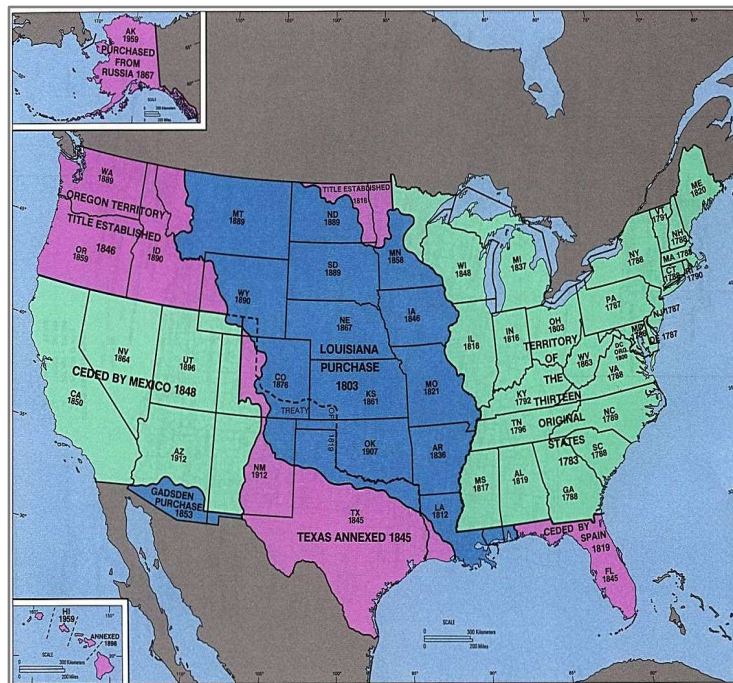
– Exodus 20:1-17—Read or listen to this passage in the ESV at:

<http://www.bible.is/ENGESV/Exodus/20>

Lesson One

History Overview and Assignments The Mid-Nineteenth Century

BEGINNING ABOUT the time Andrew Jackson was President of the United States during the 1830s, the national government began to grow and compete with the rights of the individual states. The various sections of the country were held together during this time by compromises that had never really settled any of the issues dividing the country. Thus, an appeal was eventually made to sword and cannon to settle the question of slavery or freedom to soil previously unoccupied. New means of communication and transportation made migration to the new lands so popular that the troublesome question could no longer be put off. At the same time, unrest was stirring throughout the world, erupting into uprisings and wars over territory and nationalistic interests.



A map showing the growth of the United States during the 19th century

Reading and Suggested Assignments

- Review the discussion questions and vocabulary, then read the article: *Growth of the Republic*.

- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Choose one of the significant writers mentioned, do some brief outside research, and prepare to discuss with the class his life, some of his best-known work, and his influence.
- Find and read a copy of Tennyson’s poem **“The Charge of the Light Brigade.”**
- Do some brief research on Florence Nightingale and her exemplary medical work during the Crimean War. Be prepared to share your findings with your class.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

Washington Irving	Cyrus H. McCormick	Crimean War
Oliver Wendell Holmes	Charles Goodyear	The Charge of the Light Brigade
James Fenimore Cooper	Elias Howe	Florence Nightingale
Nathaniel Hawthorne	Inventions of: steel plow, threshing	Queen Victoria
Henry Wadsworth Longfellow	machine, the reaper, vulcanized	Victorian Era
James Russell Lowell	rubber, sewing machine, steel	Great Exhibition
John Greenleaf Whittier	pen, use of kerosene and	Irish Potato Famine
William Cullen Bryant	petroleum oil, matches	Camillo di Cavour
<i>North American Review</i>	Cyrus W. Field	Victor Emmanuel II
<i>Harper’s Monthly</i>	Quintuple Alliance	Otto von Bismarck
<i>The Atlantic</i>	July Revolution	Wilhelm I
<i>American Journal of Science</i>	Charles X of France	Austro-Prussian War
New York Central & Hudson River	European Revolution of 1848	Austro-Hungarian Empire
Railway	Second French Republic	Franco-Prussian War
Erie Railway	French Revolution of 1848	German Reich
Pennsylvania Railroad	Napoleon III	Adoniram and Ann Judson
Baltimore & Ohio Railway	Nicholas I	David Livingstone
Jethro Wood	“Great Game”	Hudson Taylor

Discussion Questions

1. Name five challenges the United States faced in result of the increasing growth of the population.
2. What was the total of growth between the years of 1840-1850, and what were the main causes of the growth?
3. How did the distribution vary between older and newer states?
4. Describe the developments that occurred in education between 1830 and 1860.
5. What was one of the important differences between the newspapers of Washington and Jackson’s time and the newspapers of the 1850s and 1860s?
6. How was mail transported throughout the country by the 1860s?
7. Through what printed means were important writers such as Longfellow, Lowell, and Whittier developed?
8. Describe the significance of the growth of the canal system during this time.
9. Describe the significance of the growth of the railroad system during this time.
10. During this time which matters were left to the states to consider and decide, and which matters were left to the Union or Federal government?
11. How did this begin to divide the people?
12. Why did the American South feel like it was being treated unfairly in the area of internal improvements?
13. Why did the Quintuple Alliance fail to keep peace in Europe after Napoleon’s downfall?
14. What resulted in France after the French Revolution of 1848?
15. Briefly describe the causes and outcome of the Crimean War.
16. For what did Florence Nightingale become known during this war?
17. How did untrustworthiness play a significant role in the unifications of both Italy and Germany?
18. Describe the extent of the British Empire by the mid-nineteenth century.
19. What disastrous event in Ireland fueled the Irish movement calling for independence?
20. Briefly describe the missionary contributions made by the Judsons, David Livingstone, and Hudson Taylor.

Adapted for High School from the book:
A History of the United States
by William M. Davidson
Growth of the Republic
1830 – 1860

The Close of an Era

The year 1860 marked the close of an era in national development in America which had begun about Andrew Jackson's time. The Union grew during this era until it could compete for its rights with the states. The various sections were held together by compromises which never did more than temporarily settle disputes. An appeal was now to be made to the sword. The westward movement of the people brought about a practical application of the question of slavery or freedom to soil hitherto unoccupied—a question not yet decided. The improved means of transportation made migration to the new lands so easy that the troublesome question could no longer be compromised.

Territorial Growth

During these years the expanding United States rounded out the home territory it was to occupy permanently. Like a great band it stretched across the middle of the continent from ocean to ocean. Its commerce could find protection along five-sixths of the habitable coast on the Atlantic, around three-fourths of the Gulf shore proper on the south, and over a thousand miles on the Pacific coast. No unsettled boundary disputes remained to cause anxiety about rights to the soil in the future. With the exceptions of a few places like the valley of the Red River of the North, the United States occupied the land as far north as was desirable owing to the cold, and as far south as the heat would allow practical development.

POPULATION

Growth in Numbers

So many things depend on the growth of population that it must be considered constantly in a young nation. Not only military and naval strength, but also the clearing of the forests, the amount of produce raised, and the extent of manufactured items produced, grow in direct ratio to the number of workers and the number who are to be fed and clothed. The unusual growth of population in the United States made possible the nation's great development during this middle period. Where 3

people dwelt in the United States when the Union was established, 12 were to be found in 1830, and 31 in 1860. In other words, the population had multiplied 10 times in 70 years. During the same time, the population of England had not doubled, and that of France had increased by only one-half.

The growth in numbers during this period was due largely to immigration. Between 1820 and 1830, nearly 150,000 people came from the old world to live in the new. During the next ten years, nearly 600,000 came. Between 1840 and 1850, the number increased to gigantic proportions. Nearly 800,000 came from Ireland alone, largely because of the failure of the potato crop two years in succession. Almost 500,000 came from Germany, due to the political troubles in that country. The total for the ten years was almost two million, or nearly one-tenth of the entire population of the United States. During the next ten years ending in 1860, the number reached 2.5 million—mostly from Ireland again, followed by Germany, then England, then Canada, and then France. By the year 1860, out of every 100 people living in the United States, 13 had been born in a foreign country.

Distribution

Although the number of people had increased tenfold, different parts of the Union had grown at different rates. People had rushed into the new states. At one point, Indiana increased 500% in 10 years. New Hampshire, on the other hand, which had been growing at a rate of 10 people to every 100 in 1830, had fallen to 2 to 100 in 1860. Georgia had fallen in the same way from 51 to 16.

The Northern states had gained, on the whole, more than had the Southern states. In 1830 there were 7 million people north of the slavery and freedom line to five million south of it. In 1860 there were 19 million north to 12 million south of the line.

Cities

The great modern problem, the enormous growth of the cities, was easily predicted in 1860. In 1830 there had been only 26 cities having over 8,000 inhabitants, and not one had more than a quarter of a million. By 1860 there were 141 cities with more

than 8,000 people, and two had more than half a million. Out of every hundred people in 1830, only 6 lived in cities, but thirty years later 16 out of every 100 preferred the city to the country.

Soon one-fifth of the entire population would be in the cities, having abandoned the farms and making the proper management of so many people living together a difficult task. Gas was piped through the streets of the principal cities about 1830 and was much feared at first because of the danger of explosion. Streetcars, shaped like stagecoaches and hitched several together, were put on the streets of New York about the same time. They were drawn on rails by horses. By 1860 there were over four hundred miles of streetcar tracks in the leading cities.

EDUCATION

Schools and Colleges

The middle period of the century was marked by the adoption of the public school system, supported by public taxation, in each of the new states as they formed their governments. As the system improved, a “high school” was planned to supplement the course of study offered in the grade schools. The study of chemistry applied to soils opened the possibility of scientific farming, and “farmers’ high schools” were planned in many states. They were the forerunners of the present agricultural colleges. Many sectarian colleges were opened in the newer states.

Newspapers and Mails

The newspapers of 1860 did not look like those of the present day. Those established in large cities had begun to assume their present aspect of great business enterprises. Where the newspapers of Washington or Jackson’s time printed only the news occurring in their immediate vicinity, it was now possible to describe events in all parts of the United States within twenty-four hours of their occurrence.

The spread of the electric telegraph made the difference. In 1799 it had taken the news of Washington’s death two weeks to reach the Boston newspapers; the inaugural address of Jefferson required only 9 days; the inaugural address of Jackson in 1832 needed only 3 days; the last address of Buchanan was printed in Boston the morning following its delivery at noon in Washington.

What the telegraph was to the newspapers the railroads were to mails. Mail routes were established

over railways as rapidly as they were extended into different parts of the country. Mails and newspapers improved the spread of information and the growth of national pride and feeling.

Literature

As the wealth and leisure of the people increased, a higher condition of life was developed. Printing presses were multiplied, and libraries greatly increased. Best of all, a home literature had been encouraged, and several writers of merit emerged. As the sketches of **Washington Irving** gradually grew fewer in number, a new writer of almost equal charm, **Oliver Wendell Holmes**, appeared to take his place. The novelist **James Fenimore Cooper** was succeeded by another American novelist, **Nathaniel Hawthorne**. A group of poets had arisen in New England—**Henry Wadsworth Longfellow**, **James Russell Lowell**, and **John Greenleaf Whittier**. Another not less noted was **William Cullen Bryant** of New York. Two great historians, Prescott and Motley, were writing of foreign countries, and George Bancroft had issued the first volumes of his history of the United States.

These writers were developed largely by the excellent magazines which had replaced the inferior publications of the earlier time. The *North American Review*, *Harper’s Monthly*, *The Atlantic*, and the *American Journal of Science* were the leaders in this new era of periodical literature.

TRANSPORTATION

The Era of Canals

Although the cost of construction was far greater for a canal than a wagon road, the weight of goods which could be shipped on the one was so much larger than the other that canals were laid out to connect all the important waterways. Between 1820 and 1850, nearly three thousand miles of canals were built, chiefly in the states of New York, Pennsylvania, Ohio, Maryland, Illinois, Indiana, and Georgia. On these, vast quantities of coal, grain, timber, flour, and iron were carried to market. Passenger boats drawn by fast horses on the shore carried travelers from city to city. “A cent for a half of mile, a mile and a half an hour,” was a famous saying which shows the rate of fare and speed.

Before 1860, the canals had reached the height of their usefulness and began to decline. Railroads were built in all directions. Canals could be built only

where water could be obtained to fill them. Railroads could be built over mountains, but canals could not. Railroads could be used the entire year. Canals were closed by ice during a fourth of the year. No horse could draw a boat as rapidly as a locomotive could take a railway train. Yet the canals had filled a great purpose. They had first shown that the fertile western prairies could feed the eastern states by carrying produce to them.

The Increase of Railroads

Slowly the railroads were extended, the locomotives and cars improved, and gradually they took the place of canals. They were built at first to connect navigable streams and lakes, but soon lines were constructed independently of the steamboats. The traveler by 1860 could ride on thirty thousand miles of railroad in the United States, where he could have found only about thirty miles during Jackson's administration. The number of miles had increased a thousand times in thirty years. Several short lines connecting New York and Albany and then Albany with Buffalo were united forming the **New York Central and Hudson River Railway**. It linked together the vessels of the ocean and those of the Great Lakes. The **Erie Railway** was built to connect the ocean with Lake Erie at Cleveland and to reach the Ohio canals. The **Pennsylvania Railroad** was constructed at great expense from Philadelphia across the Allegheny Mountains at Pittsburgh. Farther south the **Baltimore & Ohio Railway** connected the ocean with the Ohio River. By 1860, extensions of these "trunk lines" had been pushed farther west.



Share of the Baltimore and Ohio Rail-Road Company, issued 26. July 1856; signed by Johns Hopkins as president pro tempore

One could reach the Mississippi by several lines of railroad, and at St. Joseph, Missouri, could reach

the Missouri River. From this place, the mails were sent by "overland express" across the continent to California. The post-riders constituting the overland express flew swiftly on their little ponies across the plains and over mountains, having once made the entire distance in ten days for a wager. Each rider had his own portion of road to travel, receiving the mail at one end and passing it to the next rider at the other.

INVENTIONS AND DISCOVERY

During this period, the inventive genius of America was constantly at work. Farm machinery had greatly improved. The **steel plow** of **Jethro Wood**, invented in 1814, had come into general use. The **threshing machine** now took the place of the flail; the moving machine of the scythe and the sickle; and the **reaper**, patented by **Cyrus H. McCormick** in 1834, replaced the old-fashioned cradle.

Charles Goodyear's process of **vulcanizing rubber**, discovered in 1839, had built up a large business in the manufacture of rubber goods. **Elias Howe's sewing machine**, on which he secured a patent in 1846, had lessened the toil of thousands of sewing-women. Letter envelopes had come into general use. The **steel pen** had supplanted the goose quill.

The discovery and use of **kerosene**, or **petroleum oil**, had revolutionized the lighting of dwellings. Friction, or "Lucifer," matches had displaced all old-fashioned methods of "starting fires" or "striking a light." Manufacturing machinery of all kinds had been made more effective.

Locomotives had been greatly improved and the speed on railroads increased. Indeed, greater comforts had come into the homes and abounded everywhere on account of the activity of the inventive genius of America. Samuel Morse's telegraph had been expanded overseas by **Cyrus W. Field's** Atlantic cable, and messages had been transmitted from the new to the old world in 1858. Although the absolute success of the cable was not assured until eight years later; still the successful transmission of the message "Europe and America are united by telegraph. Glory to God in the highest; on earth peace and good will towards men," eloquently told the triumph of the patient inventor, Cyrus W. Field.

The telegraph, the press, and the typewriter thus were by this time the primary agents of communication for the written word.

NATIONAL UNION AND DISUNION

National Feeling

Slowly the Union grew in dignity and importance. Statesmen began to prefer to serve in national rather than state offices. Matters relating to home affairs were left to the states, but those relating to all the people or to foreign countries were quietly given over to the Union. Every new state created by the Union out of territory governed by the Union helped turn those affections of the people away from the old states to the national government. The Union prospered and grew rich after Alexander Hamilton had given it a good financial system. But the states did not all thrive, and some of them even had to refuse to pay their debts.

The people had begun to divide into two opposing groups. Those who believed that the states ought to retain all the powers not specifically granted to the national government by the Constitution were said to advocate for “states’ rights.” Those that believed in allowing a strong national government were called “unionists.” If these differences of opinion had been scattered among the people of all parts of the Union, nothing serious might have resulted. Unfortunately, they fell in exactly with disputes between the North and South over the influence each had in the national government.

Sectional Feeling

Since the time when a territory could become a state depended largely on the number of people it contained, and since each state had two senators, the influence which any section of the United States could exert in the national government was dependent directly upon its population. In the same way, the more people a state has, the more members it can have in the House of Representatives. The increase of population was so much more rapid in the Northern than in the Southern section, as has already been described, that it was impossible to maintain permanently a “balance of power” in the political strength of the two. The North could outvote the South at every point.

The South complained of the large sums of money spent by the national government in improving the rivers and harbors of the Northern states, and in building highways and canals through them. They thought this caused more people to reach that part of the country and to settle there. They also complained because much of this money came from protective tariffs levied by Congress and were

therefore paid by both sections. The “internal improvement” system, they said, brought laborers easily to the Northern factories where the tariffs sustained them.

On the other hand, the people of the North claimed that immigrants from Europe preferred to settle in the North because they did not wish to be obliged to compete with labor done by enslaved people. The North also asserted that the slavery system in the South created social classes which were morally objectionable to the immigrants.

Much of the industrial differences between north and south were due to the geography of the country, which was responsible for the rivers, harbors, the connecting roads, and the factories of the North. Differences in climate, soil, and productions also made slavery profitable in one section and unprofitable in the other.

EUROPEAN UNREST

While the United States was expanding geographically and economically during the early portion of the nineteenth century, the nations of Europe were experiencing tumultuous events. The Napoleonic Empire had destroyed existing monarchies and national boundaries. After the numerous wars that finally brought about Napoleon’s downfall, the victorious European nations were ready to enjoy a time of peace.

The Congress of Vienna from 1814 to 1815 redrew the European map, restored legitimate rulers, sought to establish a balance of power, and formed a Quadruple Alliance among the nations of Prussia, Russia, Austria, and Great Britain. France later joined, forming the **Quintuple Alliance**. However, scant attention was given to the concerns of Europe’s many different ethnic groups (some of which sought independence), and nationalistic fervor soon stirred widespread unrest.

A revolt in Spain in 1820 forced the King to accept reforms, prompting a similar uprising in Italy. These revolts were suppressed by Quintuple Alliance troops. Colonial interests, however, weakened the alliance, and a Greek rebellion against the Ottoman Empire in 1821 was supported by Britain, France, and Russia.

The European Revolt of 1848

An 1830 revolt in Paris called the **July Revolution** forced **King Charles X** to flee France, and this conflict sparked other revolts throughout

the Continent. A combination of crop failures and increased ideology emphasizing individual rights fueled the unrest until it culminated in the **European Revolution of 1848**, in which people in more than 50 countries rebelled against their governments.

In France, revolutionary leaders declared the establishment of the **Second French Republic** and demanded government-sponsored public relief, while unemployed workers fought to overthrow the government in the **French Revolution of 1848**.

The general populace of France, weary of conflict, voted overwhelmingly for Louis Napoleon, nephew of Napoleon Bonaparte, for the presidency of this Second Republic. Barred by France's constitution from seeking a second term, he took over the government and declared himself Emperor **Napoleon III** of the Second French Empire. Thus France once again experienced a dictatorship after a revolution.



Lamartine devant l'Hôtel de Ville de Paris le 25 février 1848 refuse le drapeau rouge, by Henri Félix Emmanuel Philippoteaux, depicting President Lamartine in front of the Town Hall of Paris rejecting the Socialist red flag during the French Revolution of 1848

Among the other revolutionary attempts in Bohemia, Hungary, Austria, Venice, and Milan, conflicts among the revolutionary leaders weakened their efforts, allowing the ruling powers to suppress their revolts.

The Crimean War

While conflict raged in France, the Black Sea region became another hotbed of unrest. The Ottoman Empire, which had ruled much of the Near East for centuries, had become increasingly corrupt and was failing as a military power. Tsar **Nicholas I** of Russia, seeking a warm-water seaport on the Black Sea, saw an opportunity to expand south. Declaring that the Eastern Orthodox Church needed protection, Russia provoked war with the Ottoman Turks.

This stirred great concern among the other

European nations. In what became known as the **“Great Game,”** the British and Russian empires engaged in a struggle for control over Central and South Asian territories that would last for a century. Great Britain, fearful that a Russian victory would threaten the balance of power, entered the **Crimean War** against Russia. France and Italy, for their own reasons, joined on the side of Britain, and the war raged throughout the Crimean Peninsula for two years.

The Charge of the Light Brigade

*It was during the Crimean War that the famous **Charge of the Light Brigade**, memorialized in poetry by Alfred, Lord Tennyson, took place. In this tragic military maneuver, the miscommunication of an order resulted in the advance of a British light cavalry brigade through a valley lined on both sides by Russian artillery battalions. Those leading the charge, who probably realized they had been misdirected, were quickly killed, and the disastrous charge proceeded, resulting in massive bloodshed.*

*“Cannon to right of them,
Cannon to left of them,
Cannon behind them
Volleyed and thundered;
Stormed at with shot and shell,
While horse and hero fell.
They that had fought so well
Came through the jaws of Death,
Back from the mouth of hell,
All that was left of them,
Left of six hundred.”*

*– From “The Charge of the Light Brigade,”
by Alfred, Lord Tennyson*



Charge of the Light Cavalry Brigade, 25th Oct. 1854, Under Major General the Earl of Cardigan, by William Simpson (1855) depicting the tragic charge of the Light Brigade during the Crimean War

Poor management, along with disease, plagued both sides, and in the end Russia surrendered. In

1856 a peace settlement made in Paris determined that Russia would give up its claim of protection over the Eastern Orthodox Church, and that the Ottoman Empire would be preserved, thus reestablishing the precarious balance of power that had existed before the war.

During this war on the Crimean Peninsula, an English nurse named **Florence Nightingale** mobilized efforts to establish and run a military hospital. Her insistence on effective management and sanitation revolutionized the medical field worldwide.

British Imperialism

After the defeat of Napoleon, Britain was largely unrivaled *in both her supremacy on the sea and domination over world trade. By the latter part of the 19th century the British Empire, by then the largest empire in history, had control over Canada, Ireland, India, portions of Asia, much of Africa, Australia, New Zealand, and numerous Pacific islands.*

The long reign of **Queen Victoria** (1837-1901), known as the **Victorian Era**, was marked by great technological and scientific advances, societal and educational reforms, and increasing political liberalism. In 1851, London hosted an event called the **Great Exhibition**, showcasing cultural and industrial improvements made worldwide during the 19th century.

In 1845 a devastating potato blight infected crops throughout Europe, striking especially hard in Ireland, where the potato had become a staple food for the poor. Over the next decade the **Irish Potato Famine** and resulting disease killed approximately one million Irish people, and at least 2.1 million people emigrated from Ireland. The hardships of the famine were heightened by inadequate British governmental response, which some historians condemn as genocide, believing it arose from a Darwinian philosophy that viewed the sufferers as biologically inferior and therefore unworthy of assistance. A widely circulated tract asserted that “The Almighty, indeed, sent the potato blight, but the English created the Famine.” Irish uprisings sparked by the famine fueled a growing movement calling for Irish independence.

Unification in Italy

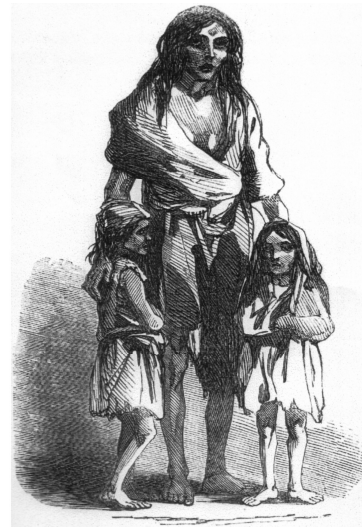
While the European countries sought to maintain a balance of power, they were nevertheless subject to powerful nationalistic interests that continued to fuel conflict.

During the Crimean War, the prime minister of the Kingdom of Sardinia, Count **Camillo di**

Cavour, sent troops against Russia in the hopes of gaining military support from the other European nations to snatch certain provinces from Austria.

Napoleon III came to his aid, secretly promising Cavour to help him gain Venetia and Lombardy in exchange for Nice and Savoy, which he coveted. However, Napoleon did not wish to see Italy unified, so after the fighting began he also secretly established an agreement with Austria.

In spite of this double-dealing on Napoleon’s part, Cavour succeeded in unifying the greater part of northern Italy for Sardinia, and then gained most of the southern regions too. In 1861 the Kingdom of Italy was officially proclaimed, with **Victor Emmanuel II** of Sardinia as its first king.



Depiction of the Irish potato famine: The *Sketch of a Woman and Children* shows a woman named Bridget O'Donnel. Her story is briefly this: “We were put out last November; we owed some rent. I was at this time lying in fever. . . . they commenced knocking down the house, and had half of it knocked down when two neighbours, women, Nell Spellesley and Kate How, carried me out. . . . I was carried into a cabin, and lay there for eight days, when I had the creature (the child) born dead. I lay for three weeks after that. The whole of my family got the fever, and one boy thirteen years old died with want and with hunger while we were lying sick.” *Illustrated London News*, Dec. 22, 1849

Unification in Germany

While pro-unification forces in Germany were thwarted in their efforts by the European Revolt of 1848, the separate German states did unify economically by establishing a successful trade union.

Count **Otto von Bismarck** sought to expand this unity into political unification. Appointed chancellor of Prussia by King **Wilhelm I**, Bismarck provoked a dispute with the King of Denmark over some small territories and enlisted Austria’s aid in

defeating Denmark. After their success, Prussia and Austria divided the territories between themselves.

Then Bismarck gained the support of other nations and provoked war with Austria. The **Austro-Prussian War** resulted in Prussia gaining control over the northern German states, while in Austria a subsequent uprising of Hungarians resulted in a newly established **Austro-Hungarian Empire**.

After this, Bismarck provoked war with France and gained the support of the southern German states to defeat Napoleon III, who had become weakened by illness. The **Franco-Prussian War** resulted in the surrender of Paris after a lengthy siege and in the proclamation of the unified **German Reich**, or empire, in 1871.

Missionary Profiles:

Adoniram and Ann Judson

*During this era of tumultuous change, God was working to spread the gospel throughout the world. **Adoniram** and **Ann Judson** were among the first American missionaries to work overseas, serving in Burma for nearly forty years. Their work, which included the translation of the Bible into Burmese, led to the development of the first American Baptist association to support missionaries.*

When Adoniram was imprisoned during the first Anglo-Burmese War, Ann lived in a shack near the prison gates, sent food and supplies to her husband and his fellow prisoners, lobbied unsuccessfully for their release, and wrote about

their experiences and the tragic societal condition of women in Burmese society.

David Livingstone

*A Scottish Congregationalist and medical doctor, **David Livingstone** became a pioneer medical missionary, anti-slavery crusader, and explorer in Africa. Driven by the belief that finding the source of the Nile River would give him sufficient influence to end the East African Arab-Swahili commerce in slavery, Livingstone conducted extensive explorations of Africa's central watershed.*

Hailed as a national hero in Victorian Britain, Livingstone was greatly admired for the inspirational story of his accomplishments.

Hudson Taylor

*English missionary **Hudson Taylor**, founder of the China Inland Mission, was a servant of God who refused to allow difficulties to hinder him from God's work. After declaring at the age of five that he would one day go to China, he followed through on this declaration, gaining a medical degree and then setting sail for Shanghai in 1854, at the age of 21. Missionaries in those days were only permitted to work in the coastal areas, but Taylor traveled inland to regions unreached by the gospel.*

After health problems required a return to England, he prayed during his recovery for workers to help him. God raised up the workers, and the China Inland Mission was born in 1865.

Lesson Two

History Overview and Assignments Women and Social Reform

“As they came to study their own history and their own part in civilization, women naturally became deeply interested in all the controversies of the day. The Temperance Movement, which aimed to curb drunkenness, made a special appeal to them, and they organized to demand the right to be heard on it. . . . The slavery issue even more than temperance called women into public life. . . . In other spheres of activity, especially social service, women steadily enlarged their influence. Nothing human did they consider alien to them.”

– from the adapted article below

Reading and Suggested Assignments

- Review the discussion questions and vocabulary, then read the article: *The New Political Democracy*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.

- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- During this lesson and the next, complete a biography notebook page on **one of the women discussed in the articles**. Research her life and contributions to both national politics and general social reform, and specifically her contribution to the Women’s Movement.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.



US women suffragists demonstrating for the right to vote, February 1913

Vocabulary

suffrage
 temperance
 inveigh
 caustic
 enfranchisement
 presumptuous

Key People, Places, and Events

Women’s Movement	Temperance Movement	Julia Ward Howe
Abigail Adams	Daughters of Temperance	Horace Greeley
Mary Wollstonecraft	Sarah Grimké	Lucretia Mott
Women’s Movement	Angelina Grimké	Elizabeth Cady Stanton
Emma Willard	Antislavery Convention of American Women	Women’s Rights Convention of 1848
Mary Lyon	World Anti-Slavery Convention	Married Women’s Property Act
Sarah J. Hale	Dorothea Dix	

Discussion Questions

1. What historical factors contributed to American women’s drive to initiate reform movements during the nineteenth century?
2. What were some of the early writings that stirred women to participate in the movement for women’s rights?
3. Describe women’s struggle for educational opportunities.
4. What were some of the political restrictions faced by women under the old common law?
5. How did reform movements draw women into public affairs, and what were some of the results?
6. Show how the rise of the factory affected the life and labor of women.
7. Why was the year 1848 an important year in the women’s movement? Discuss the work of the Seneca Falls convention.

Adapted for High School from the book:
History of the United States
 by Charles A. Beard and Mary R. Beard
The New Political Democracy

RISE OF THE WOMEN’S MOVEMENT

Protests of Colonial Women

The spirit which had gained American independence and birthed a new type of government

was of slow and steady growth. It did not spring up full-armed in a single night. It was, on the contrary, nourished during a long period of time by fireside discussions as well as by debates in the public forum. Women had shared that fireside sifting of political

principles and passed on the findings of that scrutiny in letters to their friends, newspaper articles, and every form of written word. How widespread was this potent force is revealed in the collections of women's letters, articles, songs, dramas, and satirical "skits" on English rule that have come down to us.

In their commentary on government, some women began to take thought about laws that excluded them from the ballot. At least two women left their protests on record. **Abigail Adams**, the ingenious and witty wife of John Adams, wrote to her husband in March 1776 that women objected "to all arbitrary power whether of state or males" and demanded political privileges in the new order then being created. Hannah Lee Corbin, the sister of "Lighthouse" Harry Lee, protested to her brother against the taxation of women without representation.



Abigail Adams, by Gilbert Stuart

The Stir Among European Women

Ferment in America, in the case of women as of men, was quickened by events in Europe. In 1792, **Mary Wollstonecraft** published in England *The Vindication of the Rights of Women*—a book that was destined to serve the cause of liberty among women as powerfully as the writings of Locke and Paine had served that of men. The specific grievances that stirred English women included men's invasion of women's industries, such as spinning and weaving; the denial of equal educational opportunities; and political restrictions. In France also the great Revolution raised questions about the status of women. The rights of "citizenesses" as well as the rights of "citizens" were examined by the boldest thinkers. This in turn spurred reaction among women in the United States.

Leadership in America

The origins of the American **Women's Movement** are to be found in the writings of a few

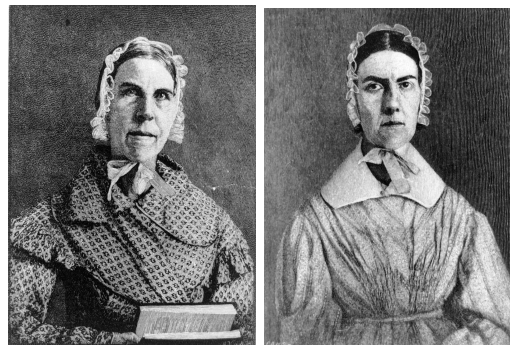
early intellectual leaders. During the first decades of the nineteenth century, books, articles, and pamphlets about women issued in increasing numbers from the press. Lydia Maria Child wrote a history of women; Margaret Fuller made a critical examination of the status of women in her time; and Mrs. Elizabeth Ellet supplemented the older histories by showing what an important part women had played in the American Revolution.

The Struggle For Education

Along with criticism, there was carried on a constructive struggle for better educational facilities for women, who had been from the beginning excluded from every college in the country. In this long battle, **Emma Willard** and **Mary Lyon** led the way; the former founded a seminary at Troy, New York; and the latter made the beginnings of Mount Holyoke College in Massachusetts. Oberlin College in Ohio, established in 1833, opened its doors to girls and from it were graduated young students to lead in the women's movement. **Sarah J. Hale**, who in 1827 became the editor of *Ladies' Magazine*, published in Boston, conducted a campaign for equal educational opportunities which helped to bear fruit in the founding of Vassar College shortly after the Civil War.

The Desire to Effect Reforms

As they came to study their own history and their own part in civilization, women naturally became deeply interested in all the controversies of the day. The **Temperance Movement**, which aimed to curb drunkenness, made a special appeal to them, and they organized to demand the right to be heard on it. In 1846 the **Daughters of Temperance** formed a secret society favoring complete prohibition of the use and sale of alcohol. They dared to criticize the churches for their indifference and were so bold as to ask that drunkenness be made a legal ground for divorce.



Sarah Moore & Angelina Emily Grimké

The slavery issue even more than **temperance** called women into public life. Sisters **Sarah** and **Angelina Grimké**, who had grown up in a slaveholding family in South Carolina, despised the institution and went north, where they joined abolitionary efforts, speaking insistently and effectively at meetings and conventions. In 1837 the **Antislavery Convention of American Women** met in New York; seventy-one women delegates represented eight states. Three years later eight American women, five of them in Quaker costume, attended the **World Anti-Slavery Convention** in London, much to the horror of the men, who promptly excluded them from the sessions on the ground that it was not fitting for women to take part in such meetings.

In other spheres of activity, especially social service, women steadily enlarged their influence. Nothing human did they consider alien to them. They **inveighed** against cruel criminal laws and unsanitary prisons. They organized poor relief and led in private philanthropy. **Dorothea Dix**, a Civil War nurse, did much to bring about reform in the care of mentally ill patients. Sarah G. Bagley organized the Lowell Female Reform Association for the purpose of reducing the long hours of labor for women, safeguarding “the constitutions of future generations.” Mrs. Eliza Woodson Farnham, matron of the women’s ward in Sing Sing Correctional Facility, was known throughout the nation for her social work, especially prison reform. Wherever misery and suffering existed, women were preparing programs of relief.

Freedom of Speech For Women

In the advancement of their causes, of whatever kind, women of necessity had to make public appeals and take part in open meetings. Here they encountered difficulties. The appearance of women on the platform was new and strange. Naturally it was widely resented. Antoinette Brown, although she had credentials as a delegate, was driven off the platform of a temperance convention in New York City simply because she was a woman. James Russell Lowell, editor of the “Atlantic Monthly,” declined a poem from **Julia Ward Howe** on the theory that no woman could write a poem; but he added on second thought that he might consider an article in prose. Nathaniel Hawthorne, another editor, even objected to something in prose because to him “all ink-stained women were equally detestable.” To the natural resentment against their intrusion into new

fields was added the ire aroused by their ideas and methods. As temperance reformers, they criticized in a **caustic** manner those who would not accept their opinions. As opponents of slavery, they were especially bitter. One of their conventions, held at Philadelphia in 1833, passed a resolution calling on all women to leave those churches that would not condemn every form of human bondage. This stirred against them many of the clergy who, accustomed to having women sit silently during services, were of no mind to treat such a revolt leniently.

Women in Industry

The period of this turmoil was also the age of the Industrial Revolution in America, the rise of the factory system, and the growth of mill towns. Much of women’s labor was transferred from the home to the factory. Then arose many questions: the hours of labor, the sanitary conditions of the mills, the pressure of foreign immigration on domestic labor, the wages of women as compared with those of men, and the right of married women to their own earnings. Labor organizations sprang up among working women.

The mill girls of Lowell, Massachusetts, mainly the daughters of New England farmers, published a magazine, *The Lowell Offering*. So excellent were their writings that the French statesman Adolphe Thiers carried a copy of their paper into the Chamber of Deputies—the lower house of the French Parliament—to show what working women could achieve in a republic. As women were now admittedly earning their own way in the world by their own labor, they began to talk of their “economic independence.”

The World Shaken by Revolution

Such was the quickening of women’s minds in 1848 when the world was startled once more by the revolution in France, which spread in a great wave to Germany, Poland, Austria, Hungary, and Italy. Once more the people of the world began to explore the principles of democracy and expound human rights.

Women, now better educated and more “advanced” in their ideas, played a role of still greater importance in that revolution. They led in agitations and uprisings. They suffered from reaction and persecution. From a prison in France, two who had been jailed for too much insistence on women’s rights exchanged greetings with American women who were raising the same issue there. By this time, the women had more supporters among the men.

Horace Greeley, editor of the *New-York Tribune*, though he afterwards recanted, used his powerful pen on their behalf. Anti-slavery leaders welcomed their aid and repaid them by urging the **enfranchisement** of women.

The Women's Rights Convention of 1848

The forces, moral and intellectual, which had been stirring among women, crystallized a few months after the outbreak of the European Revolution of 1848 in the first women's rights convention in the history of America. It met at Seneca Falls, New York, that same year, on the call of **Lucretia Mott**, Martha Wright, **Elizabeth Cady Stanton**, and Mary Ann McClintock, three of whom were Quakers. Accustomed to taking part in church meetings with men, the Quakers naturally suggested that men as well as women be invited to attend the convention. Indeed, a man presided over the conference, for that position seemed too **presumptuous** even for such stout advocates of woman's rights.

The deliberations of the Seneca Falls **Women's Rights Convention of 1848** resulted in a declaration of rights modeled after the Declaration of Independence. For example, the preamble began: "When in the course of human events it becomes necessary for one portion of the family of man to assume among the people of the earth a position different from that which they have hitherto occupied . . ." So also it closed: "Such has been the patient suffering of women under this government and such is now the necessity which constrains them to demand the equal station to which they are entitled." Then followed the list of grievances, the same number of which had been exhibited to George III in 1776.

Especially did they assail the restrictions imposed upon them by the English common law imported into America—the law which denied married women their property, wages, and legal existence as individuals. All these grievances they recited to "a candid world." The remedies for the evils which they endured were then set forth in detail. They demanded "equal rights" in the colleges, trades, and professions; equal **suffrage**; the right to share in all political offices, honors, and emoluments; the right to complete equality in marriage, including equal guardianship of their children; and for married women the right to own property, to keep wages, to make contracts, to transact business, and to testify in the courts of

justice. In short, they declared women to be persons as men are persons and entitled to all the rights and privileges of human beings. Such was the clarion call which went forth to the world in 1848—to an amused and contemptuous world, it must be admitted—but to a world fated to heed and obey.



US postage stamp commemorating the Seneca Falls Convention, titled *100 Years of Progress of Women: 1848–1948* (Elizabeth Cady Stanton on left, Carrie Chapman Catt in middle, Lucretia Mott on right)

The First Gains in Civil Liberty

The convention of 1848 did not make political enfranchisement the leading issue. Rather, it emphasized the civil disabilities of women which were most seriously under discussion at the time. Indeed, the New York legislature of that very year, as the result of twelve years of agitation, passed the **Married Women's Property Act**, setting aside the general principles of the English common law as applied to women and giving them many of the "rights of man." California and Wisconsin followed in 1850; Massachusetts in 1854; and Kansas in 1859. Other states soon fell into line. Women's earnings and inheritances were at last their own, in some states at least. In a little while laws were passed granting women rights as equal guardians of their children and permitting them to divorce their husbands on the grounds of cruelty and drunkenness.

By degrees other steps were taken. The Woman's Medical College of Pennsylvania was founded in 1850, and the Philadelphia School of Design for Women three years later. In 1852 the American Women's Educational Association was formed to initiate an agitation for greater educational opportunities for women. Institutions of higher learning soon emulated the example of Oberlin College, the first to admit female and African American students in addition to white males: the University of Utah in 1850; Hillsdale College in Michigan in 1855; Baker University in Kansas in 1858; and the University of Iowa in 1860. New trades and professions were opened to women, and old prejudices concerning their capabilities and demands slowly gave way.

Lesson Three

History Overview and Assignments Early Struggles For Women's Rights

"The National Women's Rights Convention of 1850 was followed by an extraordinary outburst of agitation. Pamphlets streamed from the press. Petitions to legislative bodies were drafted, signed, and presented. There were addresses by favorite orators like Garrison, Phillips, and Curtis, and lectures and poems by men like Emerson, Longfellow, and Whittier. In 1853 the first suffrage paper was founded by the wife of a member of Congress from Rhode Island. By this time the last barrier to white male suffrage in the North had been swept away, and the woman's movement was gaining momentum every year."

– from the adapted article below

Reading and Suggested Assignments

- Review the discussion questions and vocabulary, then read the article: *The National Struggle For Women's Suffrage, Part One* (Note: Part Two of this article will be studied in Unit 13).
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Complete the biography page assignment you began in the previous lesson.
- Be sure to visit your [ArtiosHCS](#) curriculum website for additional resources and any videos and websites assigned for this lesson.



Susan B. Anthony, 1890

Vocabulary

suffragist
spontaneity

Key People, Places, and Events

John Stuart Mill
"The Subjection of Women"

Discussion Questions

1. On November 5, 1872, Susan B. Anthony and fifteen other women cast ballots in the presidential election, though women at the time were legally prohibited to do so. Two weeks later, they were arrested. Do you think the women were justified in violating the law? In what kinds of situations do you believe violating a law is justifiable for Christians? Be prepared to make a Biblical defense of your answer.

Adapted for High School from the book:

History of the United States

by Charles A. Beard and Mary R. Beard

The National Struggle for Women's Suffrage, Part One

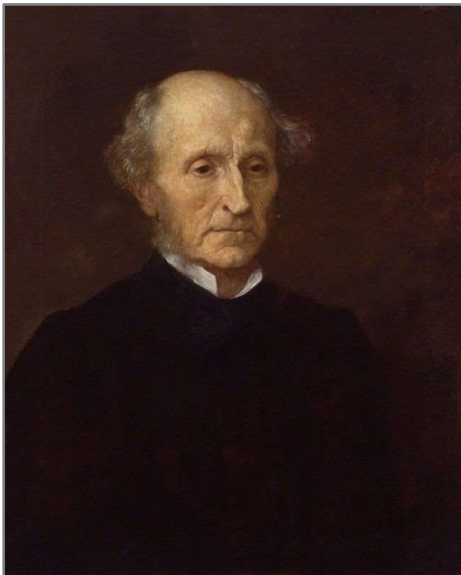
The Beginnings of Organization

As women surmounted one obstacle after

another, the agitation for equal suffrage came to the front. If any year is to be fixed as the date of its

beginning, it may very well be 1850, when the **suffragists** of Ohio urged the state constitutional convention to confer the vote upon them. With apparent **spontaneity** there were held in the same year state suffrage conferences in Indiana, Pennsylvania, and Massachusetts; and connections were formed among the leaders of these meetings. At the same time, the first national suffrage convention was held in Worcester, Massachusetts, on the call of eighty-nine leading men and women representing six states. Accounts of the convention were widely circulated in America and abroad.

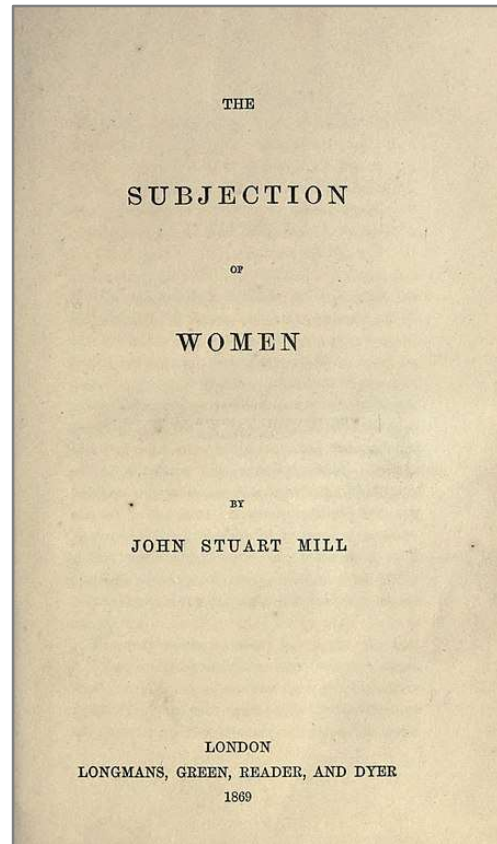
English women—for instance, Harriet Martineau—sent words of appreciation for the work thus inaugurated. It inspired a leading article in the *Westminster Review*, which deeply interested the distinguished economist **John Stuart Mill**. Soon Mill was the champion of woman suffrage in the British Parliament and the author of a powerful tract “**The Subjection of Women**,” widely read throughout the English-speaking world. In this way do world movements grow. Strange to relate the women of England were enfranchised before the adoption of the federal suffrage amendment in America.



Portrait of John Stuart Mill,
by George Frederic Watts (1873)

The national Women’s Rights Convention of 1850 was followed by an extraordinary outburst of agitation. Pamphlets streamed from the press. Petitions to legislative bodies were drafted, signed, and presented. There were addresses by favorite orators like Garrison, Phillips, and Curtis, and lectures and poems by men like Emerson, Longfellow, and Whittier. In 1853 the first suffrage

paper was founded by the wife of a member of Congress from Rhode Island. By this time the last barrier to white male suffrage in the North had been swept away, and the Women’s Movement was gaining momentum every year.



The Subjection of Women, published in 1869

The Suffrage Movement Checked by the Civil War

Advocates of women’s suffrage believed themselves on the high road to success when the Civil War engaged the energies and labors of the nation. Northern women became absorbed in the struggle to preserve the Union. They held no suffrage conventions for five years. They transformed their associations into Loyalty Leagues. They banded together to buy only domestic goods when foreign imports threatened to ruin American markets. They rolled up monster petitions in favor of the emancipation of enslaved persons. In hospitals, military prisons, agriculture, and industry they bore their full share of responsibility. Even when the New York legislature took advantage of their unguarded moments and repealed the law giving mothers equal rights with fathers in the guardianship of children, they refused to lay aside war work for agitation. As in all other wars, their devotion was unstinted and their sacrifices equal to the necessities of the hour.

The Artios Home Companion Series

Unit 2: Conflict Erupts Into Civil War

Teacher Overview

THE BLIGHT OF SLAVERY was growing and spreading through the US. Prior to America's growth and expansion, disputes concerning slavery had been largely localized in the South. The issue was forced on the national scale by faster communication and the growing battle for power between the Northern and Southern states as new territories were added to the Union, and conflict became inevitable. Abraham Lincoln, elected president during this tumultuous time, was committed to the preservation of the Union. However, the secession of the state of South Carolina, the attack on Fort Sumter, and the subsequent secession of additional states made the threat of civil war become a reality.



First Battle of Bull Run, chromolithograph by Kurz & Allison (1889)

Suggested Assignments

In this unit, students will:

- Complete two lessons in which they will learn about the **presidency of James Buchanan**, the **election of Abraham Lincoln**, and the **causes and start of America's Civil War**, journaling and answering discussion questions as they read.
- Define vocabulary words.
- Create biography notebook pages for **James Buchanan** and **Abraham Lincoln**.
- Read chapters selected by their teacher from *Uncle Tom's Cabin*.
 - *Optional:* Watch some or all of CSPAN's 1994 reenactments of the Lincoln-Douglas.
- Begin generating a list of generals involved in America's Civil War. Create a bullet point list under each general that includes the battles they were involved in and the results of those battles. *This assignment will be due at the end of Unit 5.*
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

The Bible provides the ethics by which to judge people and nations.

Read Exodus 20:1-17 in your own Bible. Please use a translation such as the ESV or KJV and not a paraphrase such as *The Message*.

God is sovereign over the affairs of men.

And He made from one man every nation of mankind to live on all the face of the earth, having determined allotted periods and the boundaries of their dwelling place.

– Acts 17:26

Lesson One

History Overview and Assignments “A House Divided”

“Side by side, two civilizations had grown up in America—the one, dedicated to progress, had kept step with the spirit of the age—for the greater portion of the civilized world had long since turned its back on slavery; the other had held tenaciously to a system in which it did not at first believe and which even in colonial days had been abhorred. Its whole social and political life had come under the iron rule of a landed aristocracy with slavery as the chief excuse for its existence. The people of the two sections had little in common. Neither understood the other. Since the Compromise of 1850 they had been drifting rapidly apart and refused to be reconciled on the question of slavery. To protect that institution, the threat of secession had been carried out, and when, on March 4, 1861, Abraham Lincoln entered Washington, it was as the president of a severed republic.”

– from the adapted article below



President James Buchanan, by George Healy (1859)

Key People, Places, and Events

James Buchanan
Dred Scott v. Sandford
Roger Taney
“Bleeding Kansas” Crisis
Abraham Lincoln
Stephen A. Douglas
Harper’s Ferry
John Brown
Jefferson Davis
Confederate States of America

Vocabulary

censure
rhetoric
sullen
conciliate
consternation

Reading and Suggested Assignments

- Review the discussion questions and vocabulary, then read the article: *Buchanan's Administration*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Create a biography notebook page on **James Buchanan**, describing his life and political struggles amid the years leading to America's Civil War.
- Read selected chapters from *Uncle Tom's Cabin*. The text is available at the link on your **ArtiosHCS** curriculum website.
 - *Optional:* Watch some or all of CSPAN's 1994 reenactments of the Lincoln-Douglas debates at the link on your **ArtiosHCS** curriculum website.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. Describe the political struggles faced by James Buchanan.
2. Describe the case Dred Scott brought before the Supreme Court.
3. What was the final Supreme Court decision regarding this case, and how was it received in the North and in the South?
4. How did the "Bleeding Kansas" Crisis end?
5. What was the important political outcome of the Lincoln-Douglas Debates?
6. Describe the events surrounding John Brown's Raid at Harper's Ferry.
7. What were the main arguments on both sides of the secession question?
8. Which state was the first to secede from the Union?
9. Within six weeks of that state's secession, what other states joined the Confederate cause?
10. Who was elected President of the Confederate States of America?
11. What did the Crittenden Compromise propose?
12. Was this compromise accepted or rejected? Why?
13. Briefly describe the differences between North and South at the time of Lincoln's inauguration.

Adapted for High School from the book:
History of the United States
by William M. Davidson
Buchanan's Administration

James Buchanan's Administration ***Democratic: 1857-1861***

James Buchanan, the fifteenth President of the United States, was born near Mercersburg, Pennsylvania in 1791. The son of a Pennsylvania farmer, he graduated from Dickinson College in his native state at the age of nineteen, and three years later entered the profession of law. He served in the Pennsylvania legislature and was elected to the lower house of Congress in 1820. He retired from Congress in 1831 and entered the United States Senate, where he continued as an active member until 1845, when he resigned to become James Polk's secretary of state. He retired to private life in 1849, but four years later was appointed minister to England, a position he held until 1856. He was still in London when he received the news of his nomination to the presidency by the Democratic Party. As a successful

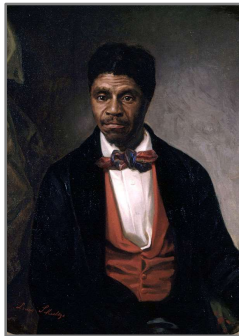
diplomat Buchanan ranks high, as is shown in his splendid record while secretary of state and minister to England, as well as in his foreign policy while president. In home affairs, however, his administration fell upon troublesome times.

The slavery question would not die down, a violent struggle over the issue was being waged in the territory of Kansas, and the North and the South were drifting farther and farther apart. The ship of state had come upon tempestuous seas, and Buchanan, despite all his years of experience, was not the helmsman to guide her safely through the storm. He was handicapped by a disposition which lacked the essential element of vigor. He owed his election to the solid South. His associates were largely from that section of the country, and he found it difficult to break the political ties which had bound him for more than a third of a century. It was charged

that he was weak and vacillating, and such blame and **censure** has been heaped upon him as to obscure almost completely his achievements in the field of diplomacy. At the end no president ever more willingly laid down the burden of official position than did Buchanan in 1861. He was not a candidate for renomination, nor did he wish to be. He retired to private life March 4, 1861, on his estate of Wheatland, near Lancaster, Pennsylvania, where he died in 1868.

The Dred Scott Decision and the Repeal of the Missouri Compromise

On March 6, 1857, two days after Buchanan's inauguration, the Supreme Court of the United States handed down its famous ***Dred Scott v. Sandford*** decision. Dred Scott had been an enslaved man in the slaveholding state of Missouri, but in 1834 he had been carried by his owner to the free state of Illinois, and two years later to the free territory of Minnesota, where, by the provision of the Missouri Compromise, slavery had been forever prohibited.



Dred Scott (1795 – 1858), plaintiff in the infamous *Dred Scott v. Sandford* (1857) case at the Supreme Court of the United States. Posthumous painting presented to the Missouri Historical Society, St. Louis, by Louis Schultz (1888)

While in the territory of Minnesota, Scott was married with his owner's consent, but on being brought back to Missouri, he, and his wife and two children were sold to another owner. Scott at once sued for his freedom and won his suit in the local court at St. Louis, on the grounds that his removal to Minnesota made him a free man by the provisions of the Missouri Compromise.

The case was appealed to the Supreme Court of Missouri, which reversed the decision. While the case was still before the Missouri courts, Scott brought a second suit for his freedom on the grounds that he was a citizen of the United States and was therefore a citizen of Missouri, and as such entitled

to his freedom. This suit was brought before the United States Circuit Court at St. Louis. This court granted his contention as to citizenship but referred the question of his freedom to a jury, which decided that he was still enslaved.

The case was then appealed to the Supreme Court of the United States. A majority of this court held (1) that non-white people, whether freed or enslaved, were not citizens of the United States; (2) that the act of temporary relocation of an owner from a slaveholding to a free state did not entitle his enslaved workers to freedom; (3) that the relocation of an owner into any of the territory made free by the Missouri Compromise did not entitle his enslaved laborers to freedom, because the Missouri Compromise was unconstitutional and void.

This decision emphatically stated that there were no free territories within the meaning of the Constitution, and implied that a slaveholder could carry his enslaved workers into any state of the Union without surrendering his right to keep them enslaved. Of all the points in the decision, this last one produced the greatest alarm in the North, where it was now felt that the boast of a prominent southern slaveholder—that he would someday be able to call the roll of his enslaved workers at the base of the Bunker Hill monument—could soon be fulfilled.

No decision from the Supreme Court of the United States had ever created such a storm. In the South it was applauded to the point of echo, while in the North it was condemned as an outrage against human freedom and opposed to the advancing civilization of the day. Many northern states resented the decision by passing more stringent personal liberty laws. Chief Justice **Roger Taney's** notorious written statement that people of African descent “had no rights which the white man was bound to respect”¹ was seized upon in the North as expressing the true feeling not only of the court but of the entire South as well. Two justices, John McLean and Benjamin R. Curtis, dissented from the majority opinion of the court. Justice Curtis set forth his objection in an able opinion, which became the generally accepted view in the North. His opinion was printed and circulated by the Republican Party as campaign literature in 1860.

Within a week after the decision had been rendered, Taney's desire of thus putting to sleep the slavery question was recognized as hopeless, even by the chief justice himself. The whole North was aroused as never before and looked upon Taney's judicial opinion as a political decision meant to

bolster up the tottering institution of slavery. It was even charged openly that the decision had been made on the demand of the leaders of the slaveholding section.

The “Bleeding Kansas” Crisis Ends in Victory for Freedom

Notwithstanding the annulling of the Missouri Compromise by this decision of the Supreme Court, the “**Bleeding Kansas**” Crisis over slavery in that proposed state continued unabated. Slavery advocates committed voter fraud to elect a convention which drew up a new state constitution permitting slavery, against the wishes of the majority of the territory’s residents. President Buchanan, wishing to gain Southern approval as well as ratify Kansas as a Democratic state, urged Congress to accept this Lecompton constitution.

In the meantime, a new election in the territory had resulted in the choice of a free-state legislature, which in December 1857, met at Leavenworth and adopted the Leavenworth constitution, which declared that all men were equal before the law. The attorney general of the United States, however, declared that the bill calling this constitutional convention was illegal, and this third attempt to adopt a state constitution fell by the wayside. While the Lecompton constitution was before Congress for its consideration, both the free-state and proslavery advocates in the territory were comparatively quiet, awaiting the outcome. But in 1858 border warfare broke out again, and the old acts of plunder, pillage, massacre, murder, assassination, and destruction of property was repeated.

The whole matter was finally disposed of in the year 1859, when a constitutional convention met at Wyandotte and adopted what is known as the Wyandotte constitution, which rejected slavery. On the 16th of October 1859, this constitution was ratified by the people of the territory, and under it, Kansas two years later became a free state.

The fight for *popular sovereignty*, by which the residents of the territory of Kansas decided upon the policy in their territory, had been a costly experiment. Two million dollars’ worth of property had been destroyed, many human lives had been lost, and the bitterest animosities engendered. For five years the Kansas struggle had been a national issue, which stirred the nation to its very depths. No doubt much wrong had been committed by irresponsible parties on both sides of the frontier struggle, but it all finally ended in the interest of

human liberty. Freedom had been victorious, and the moral sentiment of the North had prevailed.

The Lincoln-Douglas Debates

The year 1858 was made memorable by a contest in Illinois between **Abraham Lincoln** and **Stephen A. Douglas** for the United States senator seat from that state. Lincoln had become prominent in the West because of his opposition to Douglas’ Kansas-Nebraska Act, in which Douglas had promoted popular sovereignty. On account of his leadership of the Republican Party in Illinois, Lincoln became the logical candidate of that party against Douglas, the Democratic nominee.

Douglas was a man of national reputation and for years had been the recognized leader of his party in the Senate. He was a magnetic speaker and was recognized as a debater of unusual ability. Lincoln, though he had served one term in Congress as a Whig member, was not prominent in national politics; indeed, his reputation may be said to date from the year of this senatorial contest. During the progress of the contest a series of seven joint debates was arranged between Lincoln and Douglas, which took place at various places throughout the state. In these debates the political questions which were then agitating the country were argued by both debaters with such skill and eloquence as to attract at once the attention of the entire country and bring the name of Lincoln into such national prominence as to signal him as one of the ablest leaders of the new Republican Party.

In this Senate campaign Lincoln lost, but with a political foresight which has seldom been surpassed, Lincoln so embarrassed Douglas by a question which he forced him to answer (regarding the Dred Scott decision versus popular sovereignty) that he made it impossible for the Democratic Party of the South to consider his name in connection with the coming presidential contest.

In accepting the nomination for the senate seat at the hands of the state Republican Convention at Springfield, Illinois, Lincoln had responded in his now famous speech opening with these words:

“A house divided against itself cannot stand.’ I believe that this government cannot endure permanently half slave and half free; I do not expect the Union to be dissolved; I do not expect the house to fall; but I do expect it will cease to be divided. It will become all one thing or all the other. Either the opponents of slavery will arrest the further spread of it and place it

where the public mind shall rest in the belief that it is in the course of ultimate extinction, or its advocates will push it forward till it shall become alike lawful in all the states, old as well as new, north as well as south.”

Many friends had urged him to omit these words from his speech, insisting he would lose the election if he did not, whereupon his law partner, William H. Herndon, exclaimed: “Lincoln, deliver that speech as written, and it will make you president.”

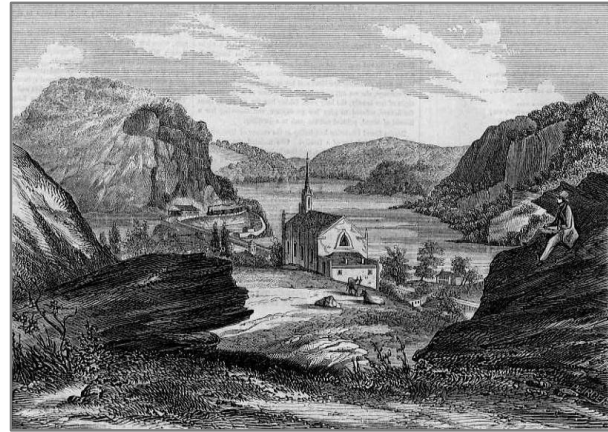
John Brown’s Raid at Harper’s Ferry—1859

On the morning of October 17, 1859, the whole country was startled by the news that a band of insurgents had seized the United States arsenal at **Harper’s Ferry**, Virginia, captured the town, and taken a number of prominent citizens prisoner. It soon became known that the leader of the band was **John Brown**, who had become known throughout the country in connection with the free-state struggle in Kansas. Virginia hurried state troops to Harper’s Ferry, but their ill-planned and feeble efforts could not dislodge the insurgents. On the evening of the day of the alarm a company of United States marines, under command of Colonel Robert E. Lee, arrived upon the scene and immediately relieved the militia. The marines, with sledgehammers and battering ram, soon forced an entrance into the arsenal, where they found Brown on his knees, dazed and bleeding, with two of his sons dead by his side. Of the nineteen raiders, two had escaped, seven were taken prisoner, and ten were found dead within the fort. Brown and his fellow prisoners were placed in chains and taken to Charleston, Virginia, where they were tried for treason and for inciting insurrection.

Brown’s trial was a notable one and excited the greatest interest throughout the country. He candidly and boldly declared to the court that he had planned to march into the slaveholding districts, set up an anti-slavery government, and spread such terror among the slaveholders of the South that they would either emancipate their enslaved workers or surrender them for a money consideration. In this way he had hoped to bring a revolution which would ultimately lead to the abolition of slavery. But the enslaved people did not join the uprising in sufficient numbers, and the effort failed.

Although Brown was found guilty and executed on the gallows, there were still thousands in the North who excused his raid as the logical outcome of

the popular sovereignty war and the Dred Scott decision. But the event threw the South into a frenzy of excitement. The cry went up that the insurrection had been planned at the instigation of the anti-slavery leaders in the North, and the breach between the opposing sections of the nation was widened.



Harper’s Ferry, [West] Virginia, from Jefferson Rock, a wood engraving published October 1854 in *Gleason’s Pictorial Drawing-Room Companion*, Boston, Massachusetts

The Presidential Election of 1860

The Democratic Convention met at Charleston, South Carolina, on the 23rd of April 1860, where it proceeded to adopt a platform before placing in nomination its candidate for the presidency. After a week’s struggle over the question of slavery, in which the delegates from the Northern states refused to endorse the extreme views advocated by the Southern leaders, the convention was split. A number of the Southern states dramatically withdrew their entire delegations from the convention. The remaining delegates, unable to agree upon a candidate, adjourned to the city of Baltimore, where, on the 18th of June, they selected Stephen Douglas of Illinois as their standard-bearer.

Following the disruption of the Democratic Party at Charleston, the Republican Party called its national convention to meet in the city of Chicago, and after an exciting contest nominated Abraham Lincoln of Illinois.

The campaign was, perhaps, the most memorable in the history of the Republic. Though it began with the usual hurrah and enthusiasm, the contest had not proceeded far when there suddenly fell upon the people a profound seriousness. Arguments were made in sober vein by party speakers and listened to in sober mood by thousands of voters who had heretofore been unlikely to applaud the eloquence and **rhetoric** of campaign

orators. A deep conviction laid hold upon the people that the Republic had come upon dangerous times and was fast approaching the greatest crisis in its history. The southern leaders, **sullen** and angry, denounced both Douglas and Lincoln, and openly threatened that if Lincoln were elected the South would apply the doctrine of Calhoun and signify its disapproval by seceding from the Union.

Douglas, before his campaign had proceeded far, came out boldly and patriotically for the maintenance and preservation of the Union. Lincoln, standing firmly on the Constitution and advocating that slavery be confined to the states which it then occupied, patiently and anxiously awaited the result at Springfield—his audience now multiplied into the tens of thousands, reading by their firesides his speeches and debates. No matter how many questions were talked up, there was but one question uppermost in the public mind, the extension of slavery in the territories.

Election Day came and passed quietly by, in keeping with the orderly manner in which the campaign had been conducted. The returns showed that Lincoln and Hamlin had received 180 electoral votes, Douglas 12, Breckinridge 72, and Bell 39.

“On the day of the election,” wrote the historian Rhodes, *“the poet Longfellow wrote in his journal, ‘Voted early,’ and the day after, ‘Lincoln is elected. Overwhelming majorities in New York and Pennsylvania. This is a great victory; one can hardly overrate its importance. It is the redemption of the country. Freedom is triumphant.’*

“The meaning of the election was that the great and powerful North declared slavery an evil and instead that it should not extended; that while the institution would be sacredly respected where it existed, the conduct of the national government must revert to the policy of the fathers, and confine slavery within bounds; hoping that if it were restricted the time might come when the southern people would themselves acknowledge that they were out of tune with an enlightened world and take steps gradually to abolish the system.

“The North had spoken. In every man’s mind rose unbidden the question, ‘What would be the answer of the South?’”

Secession

The North had not long to wait; the answer of the South was secession. The presidential election was

held on the 8th of November 1860; on the 17th of December, the legislature of South Carolina met at Charleston. At the end of a three days’ session an act of secession was passed dissolving the Union hitherto existing between South Carolina and the United States of America.

The seed sown by Calhoun had at last borne fruit in an open act of disunion. This sentiment now rapidly spread throughout the southern states. Within six weeks Georgia and every state bordering on the Gulf of Mexico—Florida, Mississippi, Alabama, Louisiana, and Texas—had followed South Carolina’s example. Nearly all the senators and representatives from those states at once resigned their seats in Congress, hastened to the South, and lent their influence to spreading the doctrine of disunion.

On the 4th of February delegates from all the seceded states, excepting Texas, met at Montgomery, Alabama, set a government in opposition to the authority of the United States, and four days later elected **Jefferson Davis** of Mississippi president and Alexander H. Stephens of Georgia vice president of the **Confederate States of America**.

Buchanan’s Policy

While these events were taking place in the South, thoughtful men in every section of the country viewed with alarm the rapid spread of the disunion sentiment. The policy of President Buchanan and his chief advisers was to **conciliate** the South and “beg them to return to the Union.” In a message to Congress, Buchanan informed that body that “the long-continued interference of the Northern people with the question of slavery in the southern states has at last produced its natural effect.” He begged the Northern states to repeal their personal liberty laws. He insisted that the Southern states had a “right to demand this simple act of justice from the states of the North.” Buchanan, while not a “disunionist”—he denied the right of any state to secede from the Union—nevertheless arrived at the conclusion that “no power has been delegated to Congress, or to any other department of the federal government to coerce a state into submission which is attempting to withdraw or has actually withdrawn from the Union.” This policy paralyzed the national government and spread **consternation** throughout the loyal states. The cry went up from Union people all over the land as they recalled how nullification had been suppressed by Andrew Jackson in 1832—“O for an hour of Old Hickory!” they cried.

Buchanan's Cabinet soon fell to pieces, the disunionist members resigning their positions and flying to the South. A Union Cabinet at once took its place.

In this Cabinet was Edwin M. Stanton, a pronounced Union man, and John A. Dix, who on assuming his duties as secretary of the Treasury roused the patriotism of the whole North by his thrilling dispatch to the revenue office in New Orleans: "If anyone attempts to haul down the American flag, shoot him on the spot." The vigorous northern Democrats saved Buchanan's administration in its final days from complete collapse, and restored confidence in the stability of the national government.

Last Efforts at Compromise— The Peace Convention

In the meantime, Senator John J. Crittenden of Kentucky proposed the "Crittenden Compromise," which asked that an amendment be added to the Constitution separating the territory of the United States into slaveholding-state and a free-state portions, the boundary between them to be the old line of 36° 30'. The compromise was not looked upon with favor in Congress.

On the suggestion of the Virginia legislature, a peace conference was called to consider the state of public affairs. Accordingly, delegates from twenty-one states met at Washington on February 4, 1861, and proposed an amendment to the Constitution prohibiting slavery north of the parallel of 36° 30' and permitting it south of that line. By its provisions no state could pass a law giving freedom to a freedom seeker or to enslaved persons accompanying an owner temporarily into a free state. Congress could in no way interfere with slavery south of the dividing line. The commerce of enslaved people was to be prohibited forever in the United States.

Like the Crittenden Compromise, the recommendation of the peace conference fell by the wayside—a general feeling grew in Congress and throughout the North that there should be no further compromise with slavery.

Government Property Seized: Star of the West Fired Upon

Meanwhile, officers were resigning from the army and the civil service and joining their fortunes with the seceded states. Arsenal, custom houses, and post offices were taken possession of, and government property was seized on all sides. Of the

southern fortresses, Fortress Monroe at the entrance of Chesapeake Bay, Fort Sumter in Charleston Harbor, Fort Pickens at Pensacola, and the defenses near Key West alone remained in possession of the government. Fort Sumter had, after the hostile act of South Carolina, been taken possession of by Major Robert Anderson, who was in command of a small force of United States troops at that point. His action was approved by Congress, although he received but little encouragement from President Buchanan. The steamer *Star of the West* was sent with supplies to Fort Sumter, but on nearing the fort was fired upon by a Confederate battery, whereupon it returned to the North and left Major Anderson to provision his garrison as best he could. Nothing was being done by either president or Congress; the state of the state seemed becalmed in the face of threatening storm.

New States: The Census: Relative Strength of North and South

The federal Union at this time comprised thirty-four states—Minnesota having been admitted in 1858 as the thirty-second state; Oregon in 1859 as the thirty-third; and Kansas in 1861 as the thirty-fourth. While all three came into the Union as free states, the constitution of Oregon was peculiar in that it forbade African persons to settle within the borders of that state.

The total population in 1860, according to the eighth census, amounted to more than 31 million people, an increase of more than eight million people in ten years. Of the white population nearly 19 million persons resided in the free states, as opposed to eight million in the slaveholding states. There were 225,967 free people of African descent in the North, and 262,003 in the South. In the North there remained but 64 enslaved people, while the South had an enslaved population of nearly four million. Many people in the North declared that the South would never take up arms against the government for fear of provoking an insurrection of enslaved people in its very midst.

The North, it will be seen, had a population of more than double that of the South, and in wealth and resources it far surpassed the southern section. The spirit of nationality was strong. Free schools and colleges had been planted everywhere. The great West and Northwest states had increased more rapidly in population than any other section. The third largest state of the Union, Ohio (with a white population of 2 million), was in this section, as were Indiana and Illinois, each with a larger population

that either Virginia or Missouri, the only two southern states whose white population reached over a million.

Slavery had stunted the growth of the South in every conceivable way except in the raising of cotton and the cultivation of sugar cane, and no doubt these industries would have thrived as well, if not better, in the hands of free labor. Indeed, as Hinton Helper had argued in his *Impending Crisis*, free labor in the South had been robbed of its just rewards. Free schools were lacking, railroads and means of intercommunication had not multiplied rapidly; hence travel between the North and South was not fostered. On the other hand, railroads were numerous in the North, and had bound the East firmly to the West by commercial ties which could not be severed.

Side by side, two civilizations had grown up in America—the one, dedicated to progress, had kept step with the spirit of the age—for the greater portion of the civilized world had long since turned its back on slavery; the other had held tenaciously to a system in which it did not at first believe and which even in colonial days had been abhorred. Its whole social and political life had come under the iron rule of a landed aristocracy with slavery as the chief excuse for its existence. The people of the two sections had little in common. Neither understood the other. Since the Compromise of 1850 they had been drifting rapidly apart and refused to be reconciled on the question of slavery. To protect that institution, the threat of secession had been carried out, and when, on March 4, 1861, Abraham Lincoln entered Washington, it was as the President of a severed republic.

1. "Dred Scott case" PBS/WGBH. Retrieved January 23, 2016.

Lesson Two

History Overview and Assignments Abraham Lincoln and the Civil War

ABRAHAM LINCOLN, the sixteenth president of the United States, is generally considered the greatest American statesman of the nineteenth century. Although from humble beginnings and a limited formal education, Lincoln led the Union through one of the darkest periods in American history.



Lincoln Home National Historic Site in Springfield, Illinois

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Key People, Places, and Events

Abraham Lincoln
Fort Sumter
P.G.T. Beauregard
Robert Anderson
Union Blockade
George B. McClellan
West Virginia Campaign
Jefferson City
Battle of Wilson's Creek
Robert E. Lee
Winfield Scott
Federal Hill
Arlington Heights
Battle of Bull Run

Reading and Suggested Assignments

- Review the discussion questions and vocabulary, then read the article: *Abraham Lincoln and the Civil War*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Create a biography notebook page on Abraham Lincoln, describing his life and struggles.
- Begin generating a list of generals involved in America's Civil War. Create a bullet point list under each one that includes the battles they were involved in and the results of those battles. *This assignment will be due at the end of Unit 5.*
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Vocabulary

marque and reprisal

forbearance

allay

espouse

Discussion Questions

1. In what state was Lincoln born?
2. In what other two states did Lincoln live while growing up?
3. How much formal schooling did Lincoln receive?
4. How did Lincoln educate himself?
5. What books did Lincoln read?
6. How do you think the types of books you choose to read affects your life and character, in both the short term and the long term?
7. What types of professions did Lincoln practice?
8. Why did Lincoln's Cabinet prove to be so flexible as to support his views and opinions even when they disagreed?
9. Did Lincoln initially intend to interfere with the institution of slavery where it already existed?
10. What did Lincoln feel honor bound to preserve?
11. Describe his position regarding the Union.
12. Describe the fall of Fort Sumter.
13. What is marque and reprisal?
14. Why did West Virginia separate from Virginia?
15. How was Missouri saved to the Union?
16. Who was Robert E. Lee?
17. Who was defeated at the Battle of Bull Run, and what changes did Congress make to the Union army afterward?

Adapted for High School from the book:

History of the United States

by William M. Davidson

Abraham Lincoln and the Civil War, Republican: 1861 – 1865

Abraham Lincoln's Administration

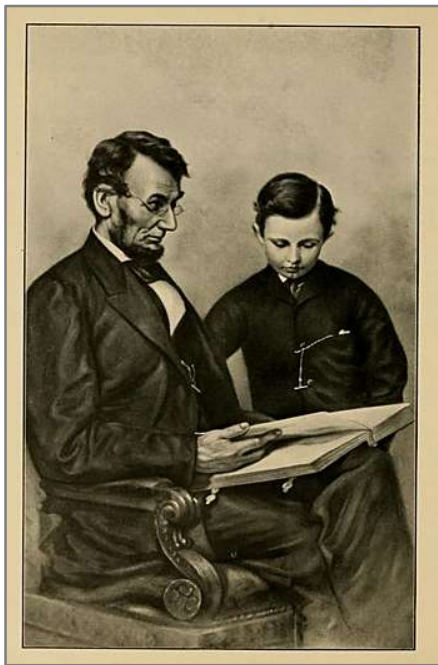
Republican: 1861–1865

Abraham Lincoln, the sixteenth President of the United States, was the greatest American statesman of the nineteenth century. He had come up from the humblest walks of life, his father having been a poor farmer in the pioneer settlements of Kentucky. When Lincoln was but seven years old, the Lincoln family moved to the state of Indiana, erected a log cabin, and began a failing struggle with poverty, hardship, and toil which were the constant lot of Abraham Lincoln in his early life. At the age of twenty-one, he moved with his father's family to a farm in the prairie state of Illinois, where another log cabin was erected and the struggle familiar to his

Indiana life was repeated. Up to the age of twenty-one, his entire education amounted to but twelve months of schooling, and yet during his youth and younger manhood he so applied himself to the acquiring of an education that he became one of the wisest statesmen of his time. His biographers dwell in detail on the untold hours he spent in studying geometry by the flickering light of a fireplace, and how through his study of the Bible and Shakespeare he acquired such skill in the use of language as to cause many of his speeches to take rank with the finest specimens of English in our literature.

Before coming to the presidency he was but little in public life. He had served as captain in the Black Hawk War, had been a member of the Illinois state

legislature for several terms, and had served a single term in Congress during the Mexican War. As a lawyer, he had risen to the head of his profession in his state. At the time of the organization of the Republican Party, he became one of its most prominent leaders. His debates with Douglas while contesting for the senate seat of Illinois revealed his keen insight into the science of government and brought him prominently before the country as one of the rising men of the nation. As a leader, he was a king among men. On assuming the presidency, he called around him an able Cabinet, four members of which represented the Democratic Party and three the Republican, each man devoted to the preservation of the Union, but all representing different views as to how such preservation should be accomplished. Each man had a national reputation, and many predicted that Lincoln's inexperience would render him unable to conduct harmoniously the affairs of government with a Cabinet representing such diverse views. But such was his strength of character, his self-reliance, and his self-confidence, and such were his powers of persuasion that the Cabinet members yielded to his will on every question where the great president found it necessary to dissent from their views.



1864 photo of President Lincoln and his son Thomas, known affectionately as "Tad"

His heart was as tender as a child's, and he loved the nature of children with such tenderness and affection that wherever he went he won their love. No more beautiful picture can be found than of the great

president reading from his mother's Bible to his son Thomas, familiarly known as little Tad. His private grief at the death of his little son William in the White House still makes the reader pause in heartfelt sympathy and forget for the moment the clash of arms on the battlefields of the Civil War. No man more fully realized the peril of the Republic than did Lincoln. On bidding his friends and neighbors farewell at Springfield upon setting out for Washington to assume the reins of government, he said,

"I now leave, not knowing when, or whether ever, I may return, with a task before me greater than that which rested upon Washington. Without the assistance of that Divine Being, who ever attended him, I cannot succeed. With that assistance I cannot fail. Trusting in Him, who can go with me, and remain with you and be everywhere for good, let us confidently hope that all will yet be well."

Lincoln's Policy

On the trip from Springfield to Washington, the President made numerous speeches, many of which revealed the great anxiety he felt for the preservation of the Union. Although he was thoroughly opposed to slavery, he recognized that it could not be eradicated if the Union were dissolved. He also sought to avoid British intervention on the side of the South. Therefore, time after time he took occasion to say that the incoming administration had no intention of interfering with the institution of slavery in the states where it already existed, and he sought in every way to give notice to the Southern states that they would be protected in their constitutional rights the same as any other section of the Union.

He entered Washington on the evening of March 3, 1861, and the next day, at half past one o'clock, delivered an able inaugural address which clearly outlined his policy. He held that the Union of the states was perpetual; that the United States was one nation and not a federation of states; that no state could, upon its own motion, lawfully withdraw from the Union; that the acts of secession passed by South Carolina and the other seceding states were legally void; and that any state opposing the authority of the United States by acts of violence was in a state of insurrection. He served notice that it was his purpose to execute the laws of the United States in every state of the Union, and that he would defend the Union at whatever cost. "In doing this," he said, "there needs to be no bloodshed or violence;

and there shall be none, unless it be forced upon the authority.” He declared it the intention of the government “to hold, occupy, and possess the property and places belonging to the government, and to collect the duties and imposts through the custom houses.”

With regard to slavery, Lincoln was a moderate. “On the question of slavery,” he said, “one section of our country believes slavery is right and ought to be extended, while the other believes it is wrong and ought not to be extended. This is the only substantial dispute . . . I have no purpose, directly or indirectly, to interfere with the institution of slavery in the states where it exists. I believe I have no lawful right to do so. I have no inclination to do so.” His closing words, memorable and touching, were to the South:

“In your hands, my dissatisfied fellow-countrymen, and not in mine, is the momentous issue of civil war. The government will not assail you. You can have no conflict without being yourselves the aggressors. You have no oath registered in heaven to destroy the government, while I shall have the most solemn one to ‘preserve, protect, and defend it.’

“I am loath to close. We are not enemies, but friends. We must not be enemies. Though passion may have strained, it must not break our bonds of affection. The mystic chords of memory, stretching from every battlefield and patriot grave to every living heart and hearthstone all over this broad land, will yet swell the chorus of the Union when again touched, as surely they will be, by the better angels of our nature.”

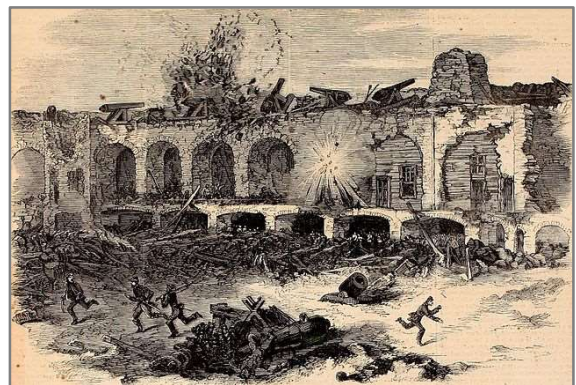
In spite of Lincoln’s valiant efforts to avoid it, civil war broke out the following month. The main issue that triggered it was the question of whether or not states had the right to secede from the Union.

The First Blow Struck:

The Fall of Fort Sumter—April 14, 1861

The Confederate authorities at Charleston having summoned **Fort Sumter** to surrender, the governor of South Carolina was officially notified that the federal authorities would send reinforcement and provision to relieve the now besieged fortress, “peaceably if it could, forcibly if it must.” Hereupon, on April 11, General **P.G.T. Beauregard**, in command of the Confederate force at Charleston, summoned Major **Robert Anderson** to surrender.

Anderson refused, and in the early dawn of the morning of April 12, 1861, the quiet of Charleston Bay was broken by the shrieking of a mortar shell fired from a Confederate battery. In an instant fifty Confederate guns, from every available point of land around the bay, were playing upon the fort with mortar and shell—the South had defied the national authority, the great rebellion was begun! Though the little garrison could offer but feeble resistance, still for 36 hours the flag of the Union was kept floating above the ramparts until the last cartridge had been loaded into the guns and the last biscuit eaten. Reduced to these straits, Major Anderson, on Sunday, April 14, 1861, surrendered the now wrecked and ruined fortress and withdrew his garrison with all the honors of war.



1864 sketch of bombardment of Ft. Sumter from *Harper's Weekly*

The Effect on the North and South of Sumter's Fall

The news of this event swept through the loyal states like wildfire. The whole North was instantly aroused. All political differences were swept aside—Northerners were Republicans and Democrats no more—all were now Unionists. Now that the nation’s flag had been fired upon and national authority defied and insulted, there was but one thought uppermost in the Northern mind: “the Union must and shall be preserved,” and rebellion suppressed.

On the day following the surrender, Lincoln issued a call for 75,000 volunteers, and the loyal states responded with such enthusiasm and promptness that troops began arriving in Washington on the very next day following the call. Within a very short space of time, 50,000 soldiers were encamped in and about the national capital. The whole North sprang to arms. All talk of compromise now ceased. Those who advocated peace at the sacrifice of the Union were reviled as “copperheads.”

The South, on its part, looked upon the fall of Sumter as a glorious victory, and Charleston and the Confederacy went wild with joy. The Southerners believed that the North would not fight—that the Northern people were too much engrossed with the spirit of commercialism to risk a contest at arms with the South.

Confederate President Jefferson Davis issued a call for 38,000 Southern troops, which was answered with alacrity. Virginia, North Carolina, Arkansas, and Tennessee, whose people had at first refused to join the seceded states, now defied the authority of President Lincoln, passed acts of secession, and joined the Confederacy. Thus was the number of states in revolt increased to eleven, holding within their borders a population of nine million people, more than one-third of whom were enslaved persons.



Davis was first depicted on CSA notes issued between April and December 1862.

Davis' Reprisals and the Union Blockade

On the 17th of April, Jefferson Davis issued a proclamation granting letters of **marque and reprisal** (which authorized the attack and capture of enemy vessels) to all owners of private armed vessels, so they might prey upon the commerce of the United States. Two days later, President Lincoln proclaimed a blockade of all the Southern ports. All the resources of the North were brought to bear to make this **Union Blockade** effectual. Within a few months, it was impossible for the Southern states to carry on their commerce or hold communication with the outside world, except through the agency of blockade runners. The Southern people could grow food in abundance, but they were not a manufacturing people, hence the South must look to Europe for supplies of arms and ammunition. And then, too, England and France had been the chief markets for the raw cotton product of the south. The blockade meant that the South would now be deprived of this source of revenue. In 1860, the amount of cotton exported by the Southern states

amounted in round numbers to \$200 million; in 1861 to \$42 million, and in 1862 to \$4 million. These decreasing figures eloquently show how complete and effectual was the blockade of the Southern ports.

The Border States

On the secession of Virginia, North Carolina, Tennessee, and Arkansas, President Lincoln instantly recognized that the very life of the nation demanded that the remaining border slaveholding states of Delaware, Maryland, Kentucky, and Missouri be saved to the Union cause. Delaware gave but little anxiety, but the struggle in each of the other three states was bitter in the extreme. When one of the Massachusetts regiments was hastening to Washington it was attacked by a mob in the streets of Baltimore, whereupon the soldiers were forced to defend themselves at the point of the bayonet. This riot was a most unfortunate circumstance, for it came at a time when the people of Maryland were ready to yield their support to the national government, though the opposing parties were quite evenly divided.

In consequence, it required the greatest tact on the part of Lincoln in all his relations with the Maryland authorities to prevent Maryland from assuming a hostile attitude toward the government in Washington. Lincoln, however, by his patience and **forbearance** and his conciliatory tone, finally **allayed** the excitement. The Union sentiment revived, and this important border state was saved to the Union. Lincoln, by his wisdom, was also enabled to strengthen the hands of the supporters of the Union in the border states of Kentucky and Missouri.

When Virginia seceded, the inhabitants of the western portion of the state, remaining loyal, imitated in a good cause her bad example and seceded from the Old Dominion. West Virginia at once organized a state government, and two years later (1863), was admitted to the Union as a separate state.

George B. McClellan and the Campaign in West Virginia

The national government, recognizing the necessity of extending aid to the loyal West Virginians, appointed General **George B. McClellan** of Cincinnati to command the troops in that vicinity. He crossed into the territory of Virginia in the latter part of May, then surprised and routed a Confederate force at Philippi on the 3rd of June, which encouraged the West Virginians to call a

convention of their own. The seceded government of Virginia now put forth extraordinary efforts to crush this opposition to her own authority. McClellan, however, at once began an aggressive **West Virginia Campaign**, which ended in complete success in the decisive engagements of Rich Mountain and Corrick's Ford. So firmly were these forty counties bound to the Union as a result of this timely campaign that rebellion never again entered their borders.

Missouri Saved to the Union

Although Missouri in convention had declared against secession by a large majority, there were within her borders many who thought Missouri ought to **espouse** the cause of the South. Francis P. Blair, a prominent citizen of St. Louis, led the Union Party. He, with Captain Nathaniel Lyon of the United States arsenal at St. Louis, had raised four regiments as a home guard. Lyon was put in command of these troops and determined to save Missouri to the Union. He sailed up the Missouri River with a Union force, captured **Jefferson City**, the capital, and put the governor and the state officers to flight. In July a loyal government was set up with a strong Union governor at its head. Lyon's force, however, had become greatly reduced in numbers. On August 10, against great odds, he gave battle to a **formidable** Confederate force in the now celebrated **Battle of Wilson's Creek**. After a gallant struggle, in which Lyon lost his life, the Union force was obliged to withdraw northward. The state, however, had been saved for the Union by Lyon's earlier victories.

It had become apparent to both sides that the struggle at arms would be for a longer time than at first anticipated. Many of the young men of the South had been educated in military academies. The military spirit in that section ran higher than in the North. They were accustomed to the use of firearms and to exploits in the open field. Some of the ablest generals in the regular army were Southerners, among whom were **Robert E. Lee**, Joseph E. Johnston, and Albert Sidney Johnston. When their states seceded, they resigned their commissions and cast their fortunes with the South. On the other hand, the military spirit of the North was feeble, and if an army was to be of service at all, it was felt by both General **Winfield Scott**, the lieutenant-general of the army, and President Lincoln, that much time and patience would be required to drill, discipline, and properly equip the troops before aggressive action could be called forth. Lincoln,

therefore, on the 3rd of May issued his second call for troops for three years, or the duration of the war. He asked for 42,000 volunteers, 23,000 men for the regular army, and for 18,000 men for service on the sea.

The Nation's Capital Threatened

In order to protect the nation's capital, Lincoln directed General Benjamin F. Butler to seize and fortify **Federal Hill** in Baltimore. This Butler did so suddenly and with such daring that Baltimore was safe in the hands of the Union army before the rebellious element in that city was aware. He next directed Colonel E.E. Ellsworth, in command of the famous 11th New York Infantry Regiment, to seize Alexandria. This was successfully accomplished.

While Ellsworth was taking Alexandria, the Union force moved across the Potomac and took possession of the entire range of hills reaching from **Arlington Heights** (Robert E. Lee's plantation) to Alexandria. Thus, with Baltimore in the hands of Butler and the Heights across the Potomac in possession of the Union force, a feeling of relief came over the national government.

First Battle of Bull Run—July 21, 1861

Immediately following the secession of Virginia, the Confederate seat of government was removed from Montgomery, Alabama, to Richmond, Virginia. The North began to grow impatient for some movement worthy of the federal forces, and "On to Richmond!" had become the constant cry for both the army and the people. Following the Union victories in West Virginia, the Confederate forces under General Beauregard had been concentrated at Manassas Junction, a point on one of the Virginia railroads 27 miles west of Alexandria. General Joseph E. Johnston, with another large Confederate force, was within supporting distance of Beauregard.

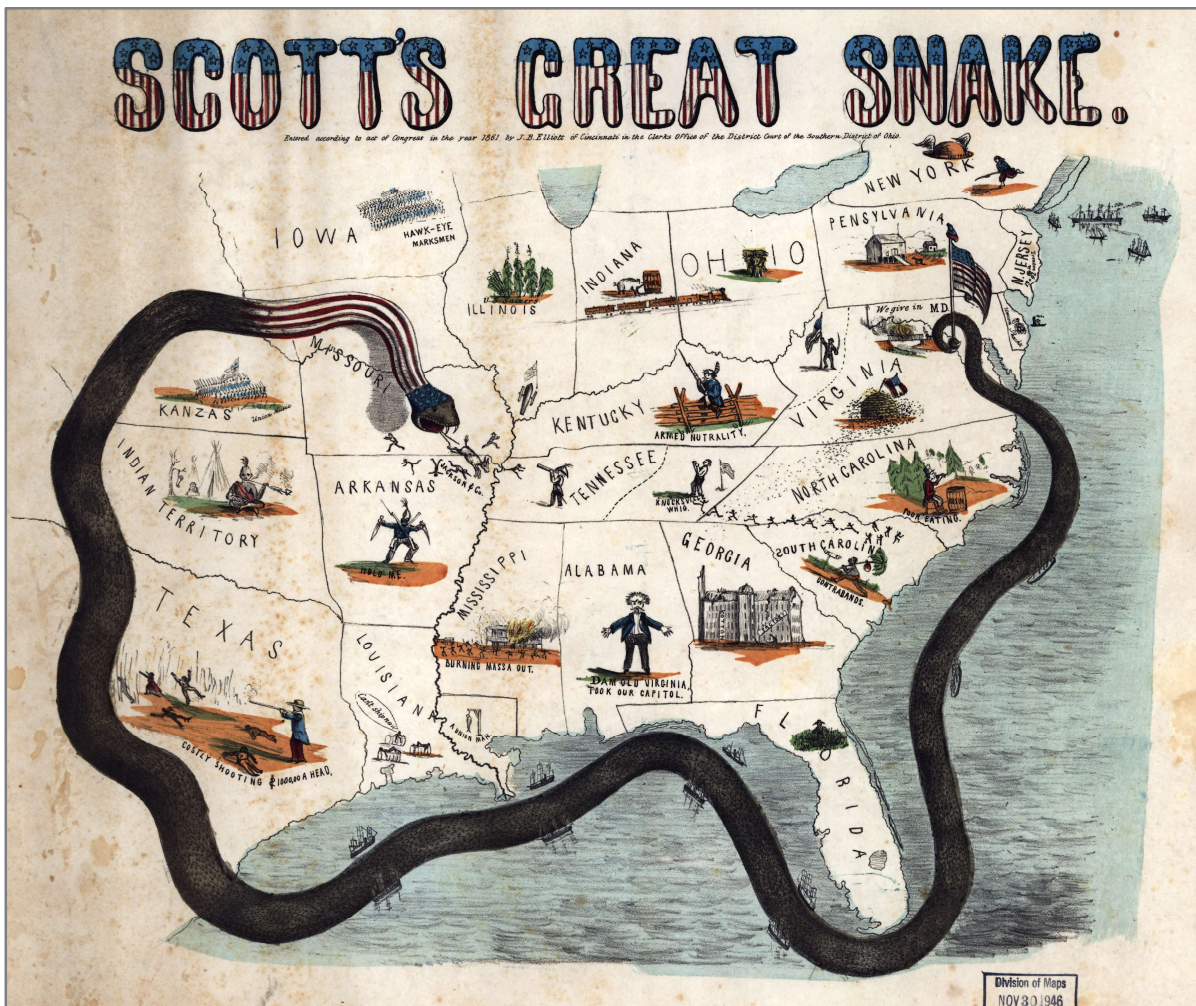
In response to the demand for a forward movement, General Irwin McDowell broke camp at Alexandria, Virginia, on the 16th of July 1861, with the intention of crushing Beauregard's army at Manassas. On the morning of the 21st of July the army came upon the Confederate force strongly entrenched between Bull Run and Manassas. The two armies were about equal in strength. McDowell began the attack with such spirit that the Confederate forces were driven steadily from the field. After four hours of fighting, when the federal troops considered the **Battle of Bull Run** as practically won, the unexpected arrival of General Johnston, with an army of fresh troops, suddenly

changed their promised victory into disastrous defeat.

The Effect of the Battle of Bull Run

As the panic-stricken troops, on the day following the battle, came straggling into Washington in the face of a drizzling rain, they were received amidst a gloom which was felt, not only in Washington, but throughout the length and breadth of the loyal states as well. The South was elated and felt that foreign recognition would now surely come. The disappointment of the national government, though great, was not sufficient to make it lose sight of the fact that the defeat at Bull Run carried with it a lesson which the North must immediately learn,

namely that the rebellion could not be suppressed in a day, nor could it ever be suppressed until the raw troops of the North had been drilled into well-disciplined and well-trained soldiers. Congress, the very day after the battle, voted to raise an army of 500,000 men, and made an appropriation of \$500 million for prosecuting the war to a successful issue. This meant war on a larger scale than the continent had ever before known and gave notice to the South that the North was desperately in earnest. Within a surprisingly short space of time, 150,000 troops were occupying the tented camps on Arlington Heights and other prominent points about the city of Washington.



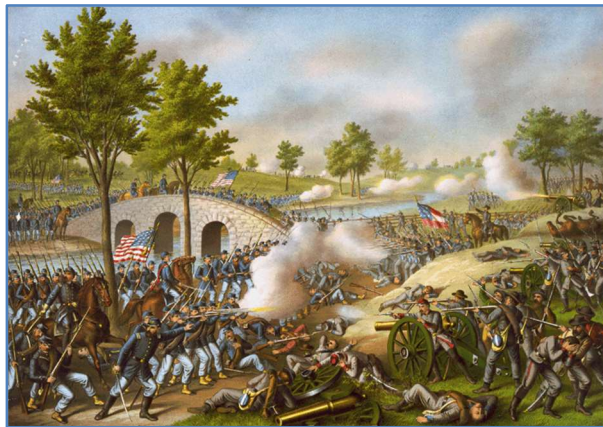
Scott's Great Snake. Cartoon map illustrating Gen. Winfield Scott's plan to crush the Confederacy economically. It is sometimes called the "Anaconda plan" (1861).

The Artios Home Companion Series

Unit 3: America's Civil War Intensifies

Teacher Overview

AS THE NORTH began to realize that the South would not be so easily defeated, both sides involved in America's Civil War found themselves struggling for a strong plan and effective leadership for their armies and their causes. It would not be until General Robert E. Lee took command of the Confederate forces and General Ulysses S. Grant began leading Union forces that strong and decisive leadership was found for each army.



The Battle of Antietam, by Kurz & Allison (1878), depicting the scene of action at Burnside's Bridge

Suggested Assignments

In this unit, students will:

- Complete two lessons in which they will learn about **significant events of America's Civil War after Bull Run through Gettysburg**, journaling and answering discussion questions as they read.
- Define vocabulary words.
- Complete biography notebook pages on **Robert E. Lee** and **Thomas "Stonewall" Jackson**.
- Track the events of the **Battle of Gettysburg** on a map of the area.
- Continue adding to their list of generals involved in the war, creating a bullet point list under each one that includes the battles they were involved in and the results of those battles. *This assignment will be due at the end of Unit 5.*
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

Honesty is a character quality to be desired.

The integrity of the upright guides them, but the crookedness of the treacherous destroys them.

– Proverbs 11:3

God hates ungodliness and slavery.

Now we know that the law is good, if one uses it lawfully, understanding this, that the law is not laid down for the just but for the lawless and disobedient, for the ungodly and sinners . . . enslavers, liars, perjurers, and whatever else is contrary to sound doctrine.

– 1 Timothy 1: 8-10

God created all human beings equal in His sight. Although we may have different and individual God-ordained purposes, God sees us as equal.

There is neither Jew nor Greek, there is neither slave nor free, there is no male and female, for you are all one in Christ Jesus.

– Galatians 3:28

Lesson One

History Overview and Assignments From McClellan's Appointment to Seven Pines

“At the beginning of the year 1862, the government at Washington planned for a vigorous prosecution of the war. It was resolved (1) to make the blockade of the Southern ports more effective; (2) to capture the Confederate fortresses along the Mississippi River, open the river to navigation and cut the Confederacy in twain; (3) to break the Confederate line of defenses from Cumberland Gap to the Mississippi, and to push a Union army southward through Kentucky and Tennessee to some point on the coast; (4) to capture Richmond and overthrow the Confederate government.”

– from the adapted article below



The Monitor and Merrimack: The First Fight Between Ironclads,
a chromolithograph of the Battle of Hampton Roads, by Jo Davidson (1886)

Reading and Suggested Assignments

- Review the discussion questions and vocabulary, then read the article: *The Civil War*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Continue adding to your list of generals involved in the war, creating a bullet point list under each one that includes the battles they were involved in and the results of those battles. *This will be due at the end of Unit 5.*
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Vocabulary

quell
belligerent

repulse
capitulation

impetuous
peremptory

Key People, Places, and Events

George B. McClellan
Samuel DuPont
Thomas W. Sherman
RMS *Trent*
Battle of Pea Ridge
Ulysses S. Grant
Capture of Fort Henry
Capture of Fort Donelson

Henry W. Halleck
Battle of Shiloh
William T. Sherman
Island Number Ten
Capture of Corinth
David G. Farragut
Capture of New Orleans

Braxton Bragg
Battle of Murfreesboro
William S. Rosecrans
Merrimack
Monitor
Battle of Seven Pines
Robert E. Lee

Discussion Questions

1. For what reasons was George B. McClellan chosen by Lincoln to command the Union forces?
2. What did the Union Blockade accomplish by the end of the war?
3. Why did the South believe that foreign countries would aid them in their struggle?
4. Describe the *Trent* Affair and its outcome.
5. Describe the status of the war at the end of 1861.
6. At the beginning of 1862, the government in Washington made an aggressive plan of action for the war. What four objectives did they set?
7. What was accomplished by the Union through the Battle of Pea Ridge?
8. How did General Grant earn his nickname “Unconditional Surrender Grant?”
9. What did the capture of Fort Henry and Donelson accomplish for the Union?
10. Why was control of the city of New Orleans so critical?
11. Who obtained control of New Orleans, and how was this accomplished?
12. What is an ironclad?
13. Describe the battle between the *Merrimack* and the *Monitor*.
14. Why do you think it is said that the *Monitor* saved the Union cause that day?
15. What tasks was General McClellan given during the year 1862? Was he successful? Why or why not?

Adapted for High School from the book:
History of the United States
by William M. Davidson
The Struggle Continues

McClellan Succeeds Scott

In October of 1861, General Winfield Scott, now grown feeble with age, resigned, and President Lincoln appointed General **George B. McClellan** to the command of all the armies of the United States. McClellan stood in high favor with the soldiers and with the people. He was a graduate of West Point and had been recognized by the War Department for many years as an officer of unusual ability.

On the earnest solicitation of President Lincoln, he had accepted the command of the forces which **quelled** the rebellion in the counties of western Virginia. Fresh from these victories, he now came to the head of an army of 200,000 men. He threw himself with energy into the business of organizing the splendidly drilled and disciplined troops comprising the army of the Potomac, the pride of the Union.

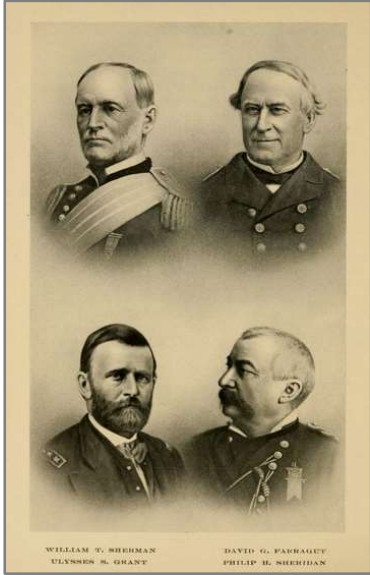
Naval Operations

In carrying out the plan of blockading the Southern ports as effectively as possible, several important naval expeditions were undertaken. In October, an expedition under command of Commodore **Samuel DuPont** and General **Thomas W. Sherman** entered the harbor of Port Royal, South Carolina, and reduced the two Confederate forts at that point.

Other important points along the coast were taken, among them Hatteras Inlet, on the coast of North Carolina. Before the close of that year, the blockade against the Southern ports was extended from Virginia to Texas and made as effective as possible, considering the small navy which the Union government had at its command at the breaking out of the war.

When the first shot was fired on Sumter, there were only 42 vessels in commission constituting the

United States Navy. By the end of 1861, 264 armed vessels had been put into service, and by the close of the war the total was little short of 700, carrying nearly 5000 guns and more than 50,000 sailors. The vigilant Northern sailors captured during the war 1500 prizes, with an aggregated value of \$30 million. It is estimated that at the close of the war the South had \$300 million worth of cotton stored idly in warehouses, waiting for shipment.



Union commanders

Foreign Relations

England and France depended upon the South for the raw cotton to supply their numerous factories. The Southerners reasoned that these countries would come to their assistance as a matter of self-protection, and that foreign intervention would prove a strong factor in forcing the North to concede the independence of the Southern Confederacy. England had, however, long since placed herself squarely against the further spread of slavery, and her people, of all nations, would have been the last in the world to encourage the upbuilding of a government whose “cornerstone” was slavery.

Nevertheless, much sympathy for the South was manifested among certain classes in England. The English government itself was not altogether friendly to the United States, though the moral sentiment of the vast majority of the English people was against interference. While the English, the French, the Austrian, and other European governments recognized the South as a **belligerent** power, they could not be induced to recognize the independence of the Confederacy.

The English authorities, however, permitted Confederate privateers, among them the famous cruiser *Alabama*, to be built and fitted out in English dockyards to prey upon the commerce of the United States.

The Trent Affair

James M. Mason of Virginia had been appointed commissioner from the Southern Confederacy to the Court of England, and John Slidell of Louisiana to the Court of France. On November 8, 1861, Union Captain Charles Wilkes of the USS *San Jacinto* intercepted the **RMS Trent**, the British mail steamer on which they were going to England, and forcibly took from her as prisoners Mason and Slidell and their secretaries.

England at once demanded the release of the envoys and an apology for such a breach of international law. The international rights for which England contended were such as the United States herself had previously insisted upon, therefore the President promptly disavowed the act, and the prisoners were given over to the British minister.

SITUATION AT THE CLOSE OF 1861

By the close of the year 1861, both the Confederate and Union armies were well organized. The North had 640,000 men in the field, while the Confederates had 210,000 and had issued a call for 400,000 volunteers. Through Lincoln’s policy the slaveholding states of Delaware, Maryland, Kentucky, and Missouri had been retained in the Union, and West Virginia had been severed from the Old Dominion. The United States government had established their blockade of the Southern ports.

Although defeated in West Virginia, the armies of the South had been successful in the first great battle of the war—Bull Run. The Confederate government securely held eastern Virginia, with its capital at Richmond, and had erected formidable defenses on the Mississippi River from Columbus, Kentucky, to Fort Jackson and Warren, below New Orleans. It had also established a line of defense from Columbus, Kentucky, eastward to the Cumberland Mountains. Along this line had been erected strong fortifications at Columbus, Fort Henry, Donelson, Bowling Green, Mill Springs, and Cumberland Gap.

Plan of Operation for 1862

At the beginning of the year 1862, the government at Washington planned for a vigorous prosecution of the war. It was resolved:

1) to make the blockade of the Southern ports more effective.

2) to capture the Confederate fortresses along the Mississippi River, open the river to navigation, and cut the Confederacy in two.

3) to break the Confederate line of defenses from Cumberland Gap to the Mississippi, and to push a Union army southward through Kentucky and Tennessee to some point on the coast.

4) to capture Richmond and overthrow the Confederate government.

IN THE WEST

Missouri Held and Arkansas Reclaimed Battle of Pea Ridge—March 7-8

Early in 1862, General Earl Van Dorn was sent to take command of a Confederate force operating in the corners of the three states, Missouri, Kansas, and Arkansas. General Samuel Curtis, with a Union force, crossed into Arkansas and fortified a strong position on **Pea Ridge** in the Ozark Mountains, where he was attacked by General Van Dorn, whose forces were beaten and put to rout. The South never again attempted organized warfare in Missouri, and later in the year the insurgents were again defeated near Pea Ridge, and Missouri was from that time on fairly established in loyalty to the Union. The following year Arkansas was reclaimed, and President Lincoln asked that its representatives and senators be readmitted to Congress.

Down the Mississippi Valley With Grant The Union Victories at Fort Henry—February 6, and Fort Donelson—February 16

The task of beginning operations in the West fell upon General **Ulysses S. Grant**, in command of a division of the western army based in the district of Cairo, Illinois. He was to cooperate with a gun-boat fleet under Commodore Andrew H. Foote, which was to ascend the Tennessee River and bombard **Fort Henry**. This the fleet promptly did, forcing the fort's surrender within two hours. Commodore Foote was directed to return to the Ohio River, make for **Fort Donelson** at once, and prepare for a combined attack. On the 12th of February, Grant's forces surrounded Donelson, which was held by 20,000 men under command of Generals Gideon J. Pillow, John B. Floyd, and Simon B. Buckner.

The Confederate generals, in a council of war, decided to cut their way through Grant's line. Just

before dawn on the morning of the 15th, 10,000 of the besieged force came pouring through the woods and fell upon the Union right, but they met a severe **repulse**. Hereupon General Buckner, at daybreak on the 16th, sent to Grant asking terms of **capitulation**. Grant's reply, "No terms except unconditional and immediate surrender can be accepted. I propose to move immediately upon your works," was cheered to the echo in the North, and "Unconditional Surrender" Grant became the hero of the western army. Fort Donelson surrendered to the Federals, and General Buckner and 15,000 troops became prisoners of war.

Effect of These Victories

The capture of Forts Henry and Donelson had broken the Confederate line of defenses, and they were compelled to fall back from Columbus on the Mississippi, and Bowling Green in central Kentucky. Thus the state of Kentucky was freed from Confederate forces, and the Mississippi was open as far south as Island Number Ten. General Buell now hastened, with a Union force, to occupy Nashville, Tennessee, which was abandoned by the now alarmed Confederate general without even an attempt to hold it. The Confederates then fell back and concentrated their forces at Corinth in the northeast corner of Mississippi.



Battle of Shiloh, by Thure de Thulstrup (1888)

Battle of Shiloh or Pittsburg Landing—April 6-7

Corinth was situated at the crossing of two very important Southern railroads, one connecting Memphis with the East, the other leading south to the cotton states. After the capture of Fort Donelson, General **Henry W. Halleck**, at the head of the army of the West, ordered the army of Tennessee to ascend the Tennessee River, encamp at Pittsburg Landing about twenty miles north of Corinth, and prepare for

an attack upon that strategic point. General Grant assumed command of these forces and awaited the arrival of General Buell with the army of the Ohio before attacking the Confederate entrenchments. General Johnston decided to attack the Federal forces before Buell's reinforcements could arrive.

Early on the morning of April 6, the Confederates rushed through the woods and drove the Union pickets within the lines. An old log meeting-house called **Shiloh**, some two or three miles from Pittsburg Landing, was the key to the Union position. General **William T. Sherman** commanded here, and he so inspired confidence in his raw recruits that they rendered service worthy of veterans. But the Union army fell steadily back before the dash and the **impetuous** charge of the Southern troops, who by noon were in possession of the Union camps. The loss of General Johnston, who had fallen on the field of battle early in the afternoon, somewhat checked the Confederate advance, and before the day closed the attack had spent its force. Night came, and with it came Buell's reinforcements.

On the 7th, Grant's forces became the attacking party, and all day long the Confederates were driven steadily from the field until they beat a hasty retreat, falling back unpursued to their former position at Corinth.

Capture of New Madrid—March 14, and Island Number Ten—April 8: Opening the Upper Mississippi

In the meantime, General John Pope attacked New Madrid on the Mississippi River. The Confederate gunboats were soon disabled, and the garrison fled to **Island Number Ten**, a few miles south, leaving ammunition, guns, and tents behind. Island Number Ten was forced to surrender on April 8. The Mississippi was thus opened as far south as Fort Pillow, near Memphis.

Capture of Corinth—May 30

After the battle at Pittsburg Landing, General Henry W. Halleck arrived from St. Louis and took command in the field. Grant advised an immediate attack upon **Corinth** before the shattered Southern forces would have time to recover, but it was the 30th of April before General Halleck commenced his slow advance. On the 30th of May he entered the besieged city, Beauregard having evacuated on the night of May 29.

General Halleck was soon called to Washington to assume the duties of general in chief of all the

armies of the Republic, and Grant became department commander, with headquarters in Corinth.

Effects of Shiloh and Island Number Ten

After the capture of Corinth, Fort Pillow on the Mississippi was abandoned by the Confederates, and the Union gunboats proceeded to Memphis. After a fierce contest, the Federals took possession of that city on June 6, thus opening the Mississippi as far south as this point and gaining control of the railroad connecting Memphis with Charleston, South Carolina. The only railroad connection which the western Confederate states now had with Richmond was by the single line of railroad running east from Vicksburg, Mississippi.

Thus by the middle of the year 1862 the state of Kentucky and all of western Tennessee had been practically cleared of the Confederate army.



*Bombardment and Capture of Island Number Ten
on the Mississippi River, April 7, 1862,
by Currier & Ives (c.1862)*

AT THE MOUTH OF THE MISSISSIPPI RIVER WITH FARRAGUT

The Opening of the Lower Mississippi: Capture of New Orleans— April 18 to May 1, 1862

On the west bank of the Mississippi River, comparatively free from attack by the Federal forces, were three great states—Louisiana, Texas, and Arkansas—with their important tributaries to the Mississippi. These states could not only give their quota of soldiers to the Confederacy but could furnish provisions of all kinds along with an abundance of cotton sufficient to meet the expenses of the South. New Orleans, the largest Southern city, had important workshops and facilities for manufacturing weapons of war and for building

ironclad ships. Realizing the importance of securing New Orleans, the national government commissioned Commodore **David G. Farragut** early in 1862 to attack the forts at the mouth of the Mississippi and take New Orleans. For five days and nights an unremitting fire was kept up, which inflicted great damage.

This method of war, however, was too slow for Farragut, who now decided to “run the batteries” and before dawn on the morning of the 24th accomplished such a brilliant feat in naval warfare as to rank him among the great leaders of the civil war and give him his “passport to fame immortal.” The forts were soon silenced with cannon fire, and the entire Confederate fleet of fifteen vessels—two of them ironclad, one the iron ram *Manassas*—was either captured or destroyed, with the loss of but one ship from Farragut’s squadron of wooden vessels. Farragut arrived before New Orleans on the 25th of April and demanded the surrender of the city.



Capture of New Orleans by Union Flag Officer David G. Farragut. Center of painting: the screw sloop of war USS *Hartford*. By Julian Oliver Davidson (before 1892)

On the 29th of April, the flag of the Union was raised above the city hall, and then on May 1 General Butler, who had accompanied Farragut with a military force, took formal possession of the city.

This **Capture of New Orleans** was a severe blow to the South. It crushed the rebellion in Louisiana, separated Texas and Arkansas from the Confederacy, took from it one of the greatest grain and cattle countries within its limits, and gave to the Union government the lower Mississippi River as a base of operations.

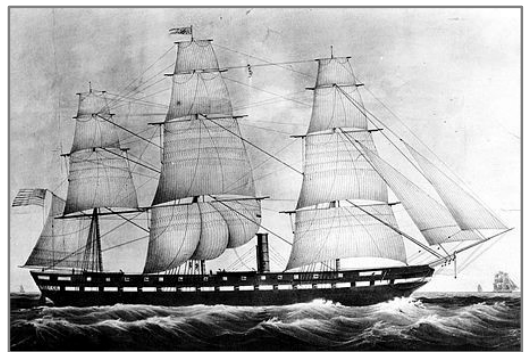
IN THE CENTER

Beauregard having resigned on account of ill health, General **Braxton Bragg** succeeded to his

Confederate command and at once planned an invasion of Kentucky. General Buell at the time was advancing in the direction of Chattanooga but marched so slowly that Bragg reached it first and hastened northward into Tennessee. Now began the race for Louisville, Buell entering just a few days in advance of Bragg. The Union commander soon turned south, and the hostile armies met at Perryville on October 8. After a stubborn conflict, Bragg retired under cover of night and retreated from Kentucky.

Battle of Murfreesboro— December 31 to January 2

General Bragg, after his retreat from Perryville, again moved northward and concentrated his forces at **Murfreesboro**. General **William S. Rosecrans**, who had succeeded Buell in command of the Union forces, advanced to attack Bragg. In the early dawn of December 31, the armies met. The Confederates, at first successful, were held in check by Sheridan’s division until Rosecrans reformed his lines on a favorable rise of ground and stationed his artillery. On January 2, Bragg renewed the attack, but Rosecrans had been given time to make his position impregnable. Despairing of victory, Bragg retreated, leaving middle Tennessee free from Confederate forces.



USS Merrimack, engraving by L.H. Bradford & Co. after a drawing by G.G. Pook

IN THE EAST

The Alarm at Hampton Roads— The Monitor and the Merrimack¹

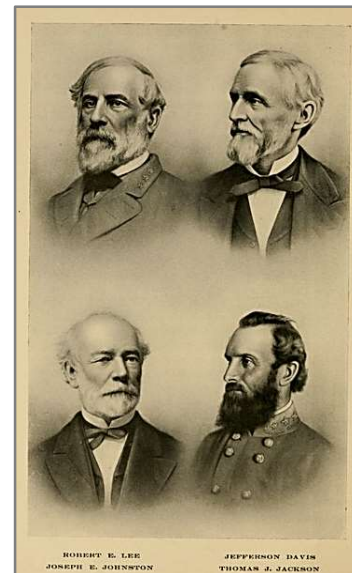
Shortly after the fall of Sumter in 1861, the United States government had ordered the destruction of the most important of all its navy yards, that at Norfolk, Virginia, rather than see it fall into the hands of the Confederacy. At that time, a large number of vessels had been scuttled, among them the fine old frigate **USS Merrimack**. When Norfolk fell into the hands of the Secessionists, the

McClellan's Peninsular Campaign

McClellan had taken command of the army of the Potomac immediately after the Bull Run disaster. His task was to crush the Confederate army of Virginia and overthrow the Confederate government at Richmond. This he was urged to accomplish at the earliest possible date. But, for some unaccountable reason, he remained inactive, occupying himself with brilliant reviews and giving no promise of forward movement.

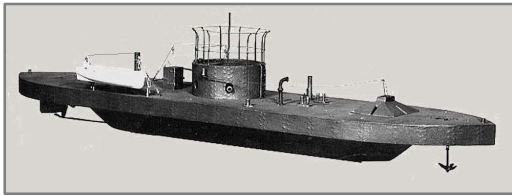
Autumn passed and winter came, and still "all is quiet on the Potomac." The whole North became impatient. "On to Richmond!" became the incessant cry of the public press, of the people, of Congress, and, indeed, of the splendid army itself. Patience at last reached its limit, and President Lincoln, early in January 1862, issued a **peremptory** order for a forward movement. McClellan delayed two months longer, and the last of March had arrived before he began embarking his army on transports at Washington. He then passed down the Potomac River, landed at Fortress Monroe on April 2, 1862, and began the disastrous peninsular campaign.

The York and the James rivers run nearly parallel from a point above Richmond to the points where two waterways empty their waters into the Chesapeake Bay, at a distance of about twenty miles apart. The strip of land lying between these two streams is called the peninsula. McClellan's plan was to move up this peninsula, carry his supplies on boats up the York River, and take Richmond.



Confederate leaders

Merrimack was raised, converted into an ironclad ram (ironclads were steam-propelled warships covered by iron or steel plates of armor), renamed the CSS *Virginia*, and directed to raise the blockade in Hampton Roads at the mouth of the James River. On the 8th of March, the *Merrimack* encountered the *Cumberland*, which poured broadside after broadside into her strange looking antagonist, but all to no purpose—her shot glanced from the *Merrimack*'s sloping roof without inflicting the slightest damage. The *Merrimack* then rammed the *Cumberland* with her iron break, driving such a hole in her side that she soon sank, carrying down nearly all on board, her flag still flying at the mast and her guns bidding defiance at the water's edge. The *Merrimack* next destroyed the *Congress* and sought to engage the *Minnesota*, but that vessel having run aground in shallow water, the *Merrimack* steamed back to Norfolk, intending to return to complete her work on the morrow.



Model of the USS Monitor

The Battle Between the Ironclads—March 9

On the 9th of March, the joyful news came over the wires that the *Merrimack* had been vanquished by a little ship called the **USS Monitor** and driven under cover at Norfolk. Immediately there went up the question, from where came the *Monitor*, a name heretofore unknown to the American Navy? This vessel, too, was an ironclad, the invention of John Ericsson, and had arrived from New York at Hampton Roads at midnight on the 8th of March and anchored beside the *Minnesota*. The *Merrimack*, returning to port, was about to open fire on the *Minnesota* when there suddenly shot out from under her prow Ericsson's *Monitor*, and the battle between the two ironclads began. For three hours the struggle continued, when the *Merrimack* gave up the contest and withdrew to Norfolk, leaving the "Yankee cheesebox," as the *Monitor* was called on account of her appearance, in undisputed possession of the waters at Hampton Roads. The *Monitor* had saved the Union cause, because it became clear to Confederates that control of the sea was not theirs. Upon no single event of the war did greater issues hang.

**Yorktown Taken—April 4:
Battle of Williamsburg—May 5-6**

McClellan at once appeared before Yorktown (on April 4) and wasted a month in a useless siege. When he finally decided to reduce its fortifications by bombardment, Yorktown was quietly evacuated. General Joseph E. Hooker overtook the retreating Confederates at Williamsburg on May 5, and on the following day captured that point.

**Battle of Fair Oaks or Seven Pines—
May 31 and June 1**

General Joseph E. Johnston, chief in command

of the Confederate forces, perceiving McClellan's timidity, fell upon the Union advance encamped along the Williamsburg and Richmond railroad, between Fair Oaks Station and **Seven Pines**, only six miles from Richmond. In the two days' bloody battle which ensued, the fighting was most desperate. In the engagement, General Johnston was wounded and carried from the field, and the Confederates finally gave up the contest, retiring to Richmond.

While the Union army won the battle, the Confederate army was not crushed, and it now came under the leadership of General **Robert E. Lee**.

1. Note: Although the *Merrimack* was renamed the *CSS Virginia* by the Confederates who turned her into an ironclad, the famous battle in which she participated nevertheless became known as the Battle of the *Monitor* and the *Merrimack*.

Lesson Two

History Overview and Assignments From the Shenandoah Through Gettysburg

“The situation at the close of the second year of the war was to the advantage of the Union cause in the West, while in the East the opposing armies still held each other at bay—neither having gained the advantage. The Emancipation Proclamation met with favor in the North and commanded the respect of the civilized nations of the world.”

– from the adapted article below



First Reading of the Emancipation Proclamation of President Lincoln, by Francis Bicknell Carpenter (1864)

Reading and Suggested Assignments

- Review the discussion questions and vocabulary, then read the article:
The Rise of General Lee and the Fall of McClellan, Part One.

- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Complete biography notebook pages on **Robert E. Lee** and **Thomas “Stonewall” Jackson**.
- On a map of Gettysburg, Pennsylvania and the surrounding area find the locations described in today’s article including Cemetery Ridge, Round Top, Little Round Top, and Culp’s Hill.
- Continue adding to your list of generals involved in the war, creating a bullet point list under each one that includes the battles they were involved in and the results of those battles. *This will be due at the end of Unit 5.*
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

Thomas J. “Stonewall” Jackson	Battle of Antietam	George S. Meade
“Seven Days’ Battles”	Ambrose Everett Burnside	Battle of Gettysburg
James Longstreet	Emancipation Proclamation	Little Round Top
Second Battle of Bull Run	Battle of Fredericksburg	Pickett’s Charge
Invasion of Maryland	Battle of Chancellorsville	George Pickett
Joseph “Fighting Joe” Hooker		

Vocabulary

impregnable	sanguinary	vantage
recommence	carnage	windrow

Discussion Questions

1. How did General Thomas Jackson earn his nickname of “Stonewall”?
2. What did he succeed in doing in the Shenandoah Valley?
3. How did General McClellan continue to fail in his duties?
4. Why was General McClellan removed from his post as commander of the Union army?
5. Up until the Battle of Antietam, the war had been a war for what cause?
6. After the Battle of Antietam, what statement did Lincoln issue that was really a “measure of war”? On what date was it issued?
7. The Emancipation Proclamation was a warning to the South, giving them a deadline to do what?
8. If the South did not heed the warning contained with the Emancipation Proclamation, what did Lincoln say would be the consequences?
9. How did the Emancipation Proclamation prevent the South from receiving foreign aid?
10. What happened to the Union troops at Fredericksburg as a result of General Burnside’s impatience?
11. What were the four objectives in the Union’s plan of operations for 1863? How did Stonewall Jackson gain victory for the Confederates at Chancellorsville?
12. What change did the press demand after that battle?
13. Trace out the events that took place at the Battle of Gettysburg.

Adapted for High School from the book:

History of the United States

by William M. Davidson

The Rise of General Lee and the Fall of McClellan, Part One

“Stonewall” Jackson in the Shenandoah Valley: Washington DC Threatened

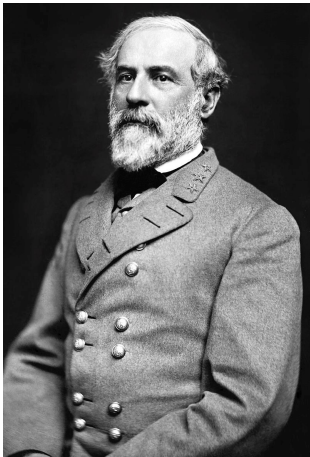
In the spring of 1862, the unwelcome news arrived at the national capital that General **Thomas J. Jackson** was moving up the Shenandoah Valley, sweeping everything before him and threatening the

nation’s capital. At the Battle of Bull Run, Jackson, on account of his firm stand, had won the nickname “Stonewall.” Lincoln, recognizing in him a general of great ability, had good cause to be alarmed at the turn affairs had taken and at once ordered General Irvin McDowell north to the defense of the national capital. He then directed General Nathaniel P. Banks

at Harper's Ferry and General John C. Frémont at Franklin to move to the Shenandoah Valley and capture the raiding general. But that dashing leader, having accomplished the purpose for which he had been sent north—to threaten Washington DC and thereby force the return of McDowell's army to the North—saw it was high time that he rejoin his chief at Richmond. He accordingly turned southward, and, by a series of brilliantly and rapidly executed movements, out-generaled Frémont, Banks, and several other Union commanders, and carried his entire force down by rail to join General Robert E. Lee in his contest with McClellan.

The "Seven Days' Battles" Before Richmond—June 26 to July 1, 1862

McClellan, disappointed at not receiving reinforcements under McDowell and fearful lest he could not protect his supplies on the York River, resolved on changing his base to the James River, an undertaking which required the greatest skill in its accomplishment. It was necessary for his army to shield and defend a train of 5,000 wagons loaded with provisions, 25,000 head of cattle, and large quantities of reserve artillery and munitions of war.



Portrait of Robert E. Lee, the Confederacy's most famous general, by Julian Vannerson (1864)

Lee, unaware of McClellan's intention, fell upon the Union force right at Mechanicsville on June 26, thereby precipitating the series of battles known as the "**Seven Days' Battles**" before Richmond—which was the Confederate capital. Jackson failed to arrive on the 26th, thus causing Lee's failure at Mechanicsville. However, on the following day, Jackson's troops came rolling into the station at Richmond, elated with their northern victories, and Jackson hastened to join his chief on June 27 on the battlefield of Gaines's Mill, where Lee had attacked

General Fitzhugh Porter. Porter maintained an unequal contest with this combined Confederate army all through the day but was finally forced from the field.

On the morning of the 28th, Porter burned his bridges behind him and hastened forward to cover the retreat of McClellan's army. On the 29th, a battle was fought at Savage's Station, in which the Confederates were repulsed, and on the 20th another at White Oak Swamp. There the Union army repeatedly drove back the Confederate advance and remained in possession of the field until nightfall, when it retired. On the same day was fought the fierce Battle of Frazier's Farm. On the following day, July 1, McClellan made his final stand at Malvern Hill. His position was here **impregnable**. Lee, however, unwilling to give up the contest, gave battle at Malvern, but his ill-advised attack resulted only in the useless destruction of life. Lee, foiled and disappointed, finally gave up the battle. On the night of July 1, 1862, under cover of a storm, McClellan retired to Harrison's Landing on the James River.

The Effect of McClellan's Failure to Capture Richmond

The retreat from the York to the James was said by McClellan's friends to have been conducted most skillfully, but this did not appease the North. The country had little use for a general who was great only in flight. The campaign which had begun with such high hopes for the country was condemned as an inexcusable failure, and the army of the Potomac and its now much abused leader were soon recalled to the North. The gloom which fell upon the North at this time was as great as that which had followed the disaster at Bull Run. The loyal governors **recommenced** recruiting, and President Lincoln, on the very day McClellan had accomplished his change of base (July 1), issued a call for 300,000 volunteers. "We are coming, Father Abraham, 300,000 strong," was the refrain which went up from every recruiting station throughout the length and breadth of the loyal states.

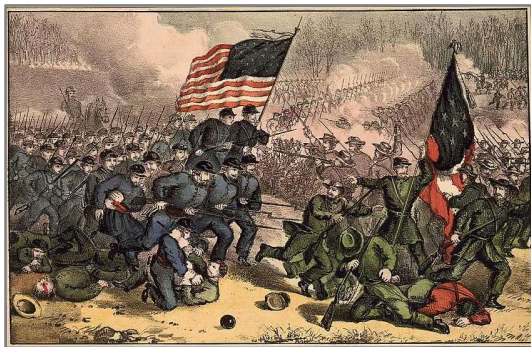
The Army of Virginia Created

In the state of Virginia were three separate and distinct military departments over which McClellan, who commanded the army of the Potomac, had no control—that of the Rappahannock under General McDowell, that of the Shenandoah under General Banks, and that of the western part of the state under General Frémont. Following the raid of Stonewall

Jackson in the Shenandoah Valley, these three departments were united and became the army of Virginia, with General John Pope as its commanding officer. Following the unsuccessful peninsular campaign, the country now looked to Pope to retrieve McClellan's failure.

Pope's Campaign and the "Second Bull Run"

Pope posted his army at the eastern base of the Blue Ridge Mountains in the upper valley of the Rappahannock so that he could protect the Shenandoah Valley, hold the Rappahannock River from its source to its mouth, and be within safe distance of Washington, should his presence be needed there.



*The Second Battle of Bull Run, Fought August 29th, 1862,
by Currier & Ives (c.1862)*

Shortly after the "Seven Days' Fight," Lee had sent Stonewall Jackson north on another of his daring raids, and a little later General **James Longstreet** was sent to join Jackson in defeating Pope before McClellan could come to his assistance. On August 29 the **Second Battle of Bull Run** followed. On that day the issue was about equal on both sides, but on the 30th, Longstreet having arrived, the battle ended disastrously to the Union army. On September 2, the army of Virginia was merged into the army of Potomac, with McClellan again the chief general in the field under Halleck. Pope was transferred to a western command.

LEE CROSSES THE POTOMAC— ALARM AT THE NORTH

Invasion of Maryland

Bull Run was hardly won before Lee, with an army of 60,000 men, crossed the Potomac at Leesburg and began the **Invasion of Maryland**. McClellan at once gave chase with the army of the Potomac, numbering more than 80,000 men. Lee

now passed westward through the gaps of South Mountain, hoping to reach Pennsylvania by the little mountain valley west of that range of the Blue Ridge. McClellan by this time was close upon Lee's heels, and on the 15th was brought to bay on Antietam Creek—a little stream entering into the Potomac a short distance above Harper's Ferry.

Battle of Antietam—September 17, 1862

On the early dawn of the morning of the 17th of September, General **Joseph Hooker**—"fighting Joe Hooker," as his troops called him—opened the engagement on the Union side. The **Battle of Antietam** which followed was one of the most **sanguinary** of the entire war, McClellan losing one-sixth of his army and Lee one-fourth of the men who had crossed the Potomac with him two weeks before. Only night put an end to the fearful **carnage**, and both armies ceased their fighting, content to let the other rest.

While the Union army was badly shaken, Lee's army was so shattered and crippled that it needed only a vigorous attack on the morrow—such as General Ulysses S. Grant had waged at Shiloh—to end the struggle. But McClellan waited for reinforcements all through that day. On the morning of the 19th of September, he prepared to renew the battle, but was too late—Lee under cover of night had escaped with his now sullen and discouraged army across the Potomac into Virginia. McClellan made no effort to pursue Lee. President Lincoln finally lost all patience with McClellan and removed him from his command of the army of the Potomac, placing in his stead the amiable General **Ambrose Everett Burnside**. Burnside did not accept this post willingly, for he did not think himself sufficiently qualified to fill it. He was soon proved correct.

THE WAR NOW FOR THE UNION AND AGAINST SLAVERY

Lincoln Proclaims Freedom to the Enslaved—

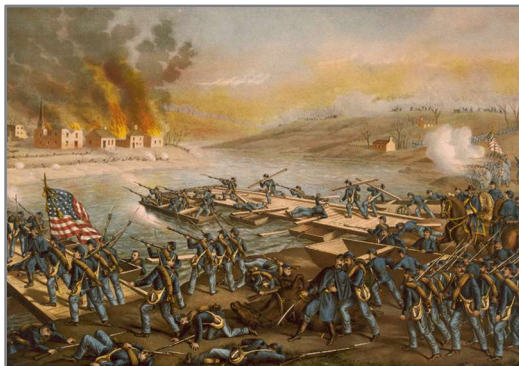
September 22, 1862, effective
January 1, 1863

The war up to Antietam had been a war for the preservation of the Union and not for the abolition of slavery. Although the antislavery advocates of the North had kept the slavery question constantly before the public, President Lincoln refused to be hurried in such an important matter, until, in his judgment, the time should be ripe to take the step as

“a measure of war.” After the victory at Antietam, he felt that the time had come to strike the South a blow, and to allow the moral sentiment of the nation to assert itself. Accordingly, five days after the victory of Antietam, he issued his first **Emancipation Proclamation** (on September 22, 1862), which served notice on the seceded states that unless they had laid down their arms and acknowledged their allegiance to the Union by New Year’s Day of January 1863, he should formally declare all enslaved people within their borders free.

The South, confident of victory, laughed his proclamation to scorn, but the blow nevertheless fell full upon that section—the Confederacy was now placed before the civilized world in its true light, as the champion of the detested institution of slavery, and help for it from nations that had abolished slavery was thereby forestalled.

True to his warning, Lincoln issued his final proclamation on the first day of January 1863, and thereby destroyed the last hope of the South for foreign intervention. It now became a war, not only for the Union, but against slavery, and along that line the issue was to be fought to a close.



Battle of Fredericksburg: The Army of the Potomac crossing the Rappahannock: in the morning of December 13, 1862, under the command of Generals Burnside, Sumner, Hooker & Franklin, by Kurz & Allison (1888)

Battle of Fredericksburg— December 13, 1862

Having gathered an army of more than 100,000 men, Burnside moved down the Rappahannock and took a position on the north side of that stream across from Fredericksburg. That city refused to surrender, and on the following day Lee’s army arrived and entrenched itself on the heights surrounding the city. Burnside, impatient to attack, crossed the stream on pontoon bridges on the 11th and 12th of December, and on the 13th gave battle. At the foot of the height immediately behind

Fredericksburg was a sunken road, and on its lower side an old stone wall behind which was massed, four ranks deep, a Confederate force.

Up the slope leading to this breastwork the Union troops swept time after time to within but a few yards of the wall, but they were met each time by a sheet of flame, piling the dead and wounded in heaps upon the field. That same daring and bravery which had characterized the Union troops at Antietam were repeated over and over, but all to no purpose—the **Battle of Fredericksburg** produced another field of carnage, and this time the victory rested with the army of the South. Burnside soon retired as chief of the army of the Potomac, General Hooker succeeding to the command.

SITUATION AT THE CLOSE OF 1862

The situation at the close of the second year of the war was to the advantage of the Union cause in the West, while in the East the opposing armies still held each other at bay—neither having gained the advantage. The Emancipation Proclamation met with favor in the North and commanded the respect of the civilized nations of the world. Lincoln followed his September Emancipation Proclamation by another call on October 17 for 300,000 volunteers, which met with a generous response at the North. Halleck was still the general in chief of the Union armies. Hooker was now to succeed Burnside as the commander of the army of the Potomac and try his skill at war with Lee. The Union armies of the West united in two departments, with Rosecrans in the center at the head of the army of the Cumberland, and Grant on the Mississippi, at the head of the army of the Mississippi and the Tennessee.

Plan of Operations For the Year 1863

The plan of operations for 1863 was to prosecute the war along the same lines which the army and navy had been fighting in the previous year:

- 1) the blockade, already effective, was to be made more so by constructing and putting into service many ironclad ships;
- 2) the army of the West under Grant was to complete the opening of the Mississippi River, thereby completely severing the Confederacy;
- 3) the army of the center under Rosecrans was to take Chattanooga and from there push through to some point on the Gulf or Atlantic coast;
- 4) the army of the Potomac, now under Hooker, was to destroy Lee’s army and capture Richmond.

IN THE EAST

The Ironclads Fail at Charleston, Battle of Charleston Harbor—April 7, 1863

After the victory of the *Monitor* at Hampton Roads, it was believed in the North that a fleet of monitors would be able to accomplish the reduction of all Confederate fortifications along the entire Atlantic and Gulf coast. Such a fleet was accordingly constructed, and, on April 7, 1863, Admiral Samuel Dupont steamed into Charleston Harbor, South Carolina, for the purpose of capturing Charleston—one of the most important coast points still in the possession of the Confederacy.

The action opened at three o'clock in the afternoon, and the fleet was soon under the fire of seventy-six of the best guns in possession of the Confederacy—all of them well mounted and skillfully handled. When the fleet withdrew, every vessel had been fearfully battered, and some of the boats completely disabled. The news of the defeat of these ironclads could hardly be believed in the North, and the greatest disappointment followed, while a new impetus was given to blockade running in the South.



Battle of Chancellorsville, by Kurz and Allison (1889)

Battle of Chancellorsville— May 2 and 3

After Fredericksburg, the army of the Potomac remained inactive across the Rappahannock River from the point where Burnside had met his bloody repulse. General Hooker had succeeded Burnside in January and by the last of April was ready to take the field. With more than 100,000 men at his command he felt sure of his ability to crush the Confederate army. He accordingly moved up the Rappahannock, crossed that stream with about 60,000 troops, and by the first of May had his army in position at Chancellorsville, ten miles from Fredericksburg.

Stonewall Jackson, at once executing his favorite

movement, marched around Hooker's army, and attacked it from the woods in the rear so unexpectedly that an entire division was rolled back upon the main body of the army, which the impetuous charge of Jackson now threatened with disaster. Hooker had been completely surprised; only night saved the Union army from utter rout.

Lee, on the following day, fought the Union army in detail, defeating it one division at a time, though he met with stubborn resistance. At night Hooker gave up the useless and bloody struggle, and on the following day withdrew under cover of a storm to his old position across the Rappahannock, to suffer censure and blame for his management.

Effect of Chancellorsville

Again, the North was filled with gloom. Two years and more of war had passed, marked by a long list of disasters in the East. The soldiers in the army of the Potomac were just as brave and fought as valiantly as did Lee's and Jackson's men. Indeed, no braver soldiers ever lived. "*Why is it,*" the public press now asked, the people asked, and Lincoln asked, "*that a leader cannot be found to lead this splendid northern army successfully against the southern foe?*" Bitter were the complaints in Congress and in the country.

Yet, amidst all this disappointment and this night of gloom, a lofty patriotism sustained the North, which still hoped on, confident that right would win, that the Union would survive, and now that the great Lincoln had spoken out on New Year's Day for human freedom, that slavery and disunion would perish together. The tide of war was soon to turn, though anxious days were still in store—indeed, had come—for Lee, emboldened by Fredericksburg and Chancellorsville, once more flew northward, spurred on by the cry now ringing forth from southern camps of "*On to Washington.*"

Lee's Second Invasion of the North

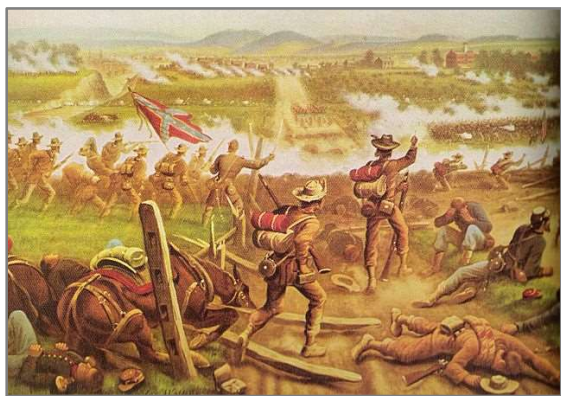
Lee broke camp in the early part of June and started on his second invasion of the North. His plan was to pass northward, east of the range of the Blue Ridge, cross into Maryland, and carry his troops forward to the fertile valleys in Pennsylvania, where he expected to find rich plunder and much-needed supplies—it being the harvest time.

He hoped to draw after him Hooker's entire army, defeat it on the free soil of the North, and then march on Baltimore—perhaps the national capital itself. No sooner had Lee crossed the mountains than

Hooker gave chase. Lee, crossing the Potomac at Williamsport and Shepherdstown, passed through Maryland, and was soon encamped at Chambersburg, Pennsylvania. He sent detachments out to capture Carlisle and extort \$100,000 tribute from the city of York. His cavalry in the meantime—10,000 strong—charged across the country, laying it waste in every direction.

Meade Succeeds Hooker in Command

Hooker had all the while been conducting a most admirable advance. But after his defeat at Chancellorsville, he had become so embittered against General in Chief Henry W. Halleck that he complained to Lincoln of that general's unkind treatment. Irritated by Halleck, he resigned his command in the face of the enemy and retired from the army of the Potomac forever. General **George G. Meade** was promptly appointed in his stead. He at once assumed command and pushed rapidly forward in the quest of Lee.



North Carolinians drove back federal troops in the first day at Gettysburg. At far left background is the Railroad Cut; at right is the Lutheran Seminary. In the background is Gettysburg.

THE BATTLE OF GETTYSBURG

The First Day's Battle of Gettysburg—July 1

The advance forces of the two armies met unexpectedly on the morning of July 1, in the vicinity of the little village of Gettysburg, and a hard-fought battle ensued. In this battle General John F. Reynolds lost his life, and the Union troops were forced to withdraw south of the city to Cemetery Ridge, a hook-shaped hill about three miles in length. At its southern extremity is Round Top, a mound about four hundred feet high commanding the valley to the west. A little to the north of this, on the crest of the hill, is Little Round Top, also commanding the valley to the west. From this point

the ridge runs northward toward the town then turns to the east, completing the hook and terminating abruptly in Culp's Hill, which commands the valley to the north and east.

It was to this ridge that Reynolds's troops had retired after the death of that officer. General Hancock soon arrived upon the field and recognized the importance of holding Cemetery Ridge as a **vantage** position to the Union army. During the night, Meade's hosts were pushed rapidly forward to this position, and when day broke on July 2, the morning sun shone upon the Union army entrenched on Cemetery Ridge, 80,000 strong, eager, and ready for battle. Across the valley to the west was Seminary Ridge, upon which Lee had gathered his forces during the night—also about 80,000 strong and as eager for the contest as was the army of the Potomac.

The Second Day's Battle: Little Round Top—July 2

Little Round Top was the key to the Union position, and this Lee resolved to take by assault. At four o'clock in the afternoon of July 2, a Confederate force advanced up the hill under the enthusiasm of the southern yell and furiously fell upon General Sickles's men, and a two hours' bloody battle ensued. While this battle was on, a Confederate force swept up the hill to Little Round Top. A hand-to-hand encounter followed in which prodigies of valor were displayed on both sides, the Confederate force finally yielding and retreating down the slope, leaving their dead and wounded scattered upon the field. At ten o'clock at night, the second day's battle ceased, and the soldiers slept upon their arms.



View from the summit of Little Round Top at 7:30 P.M. July 3rd, 1863

The Third Day's Battle: Pickett's Charge—July 3

The struggle was reopened at noon on July 3 by an artillery battle. At the end of two hours, the Confederate batteries suddenly ceased firing. A moment of ominous stillness fell upon both armies.

When the smoke lifted, a large Confederate force under Major General **George Pickett**, one of Lee's ablest generals, was seen advancing across the valley in battle array. Lee had planned to carry the Union position at the point of the bayonet! On came **Pickett's men, charging** up the slope of Cemetery Ridge, exciting the admiration of the Union army all along the battle line. The Union artillery hailed shot and shell upon this advancing host. Men were literally mowed down in **windrows**, but their places quickly filled. Up, up came Pickett's men to the very muzzles of the Union guns! There they were hurled back and rushed madly, wildly, down the slope, their lines broken and shattered, and now in utter rout. The invincible army of the South had been broken like a reed! Meade had won the day at Gettysburg, and the battle marked the turning point of the war.

The Gettysburg Address

Pickett's gallant and hopeless charge brought the Battle of Gettysburg to an end. It brought victory to the Federal side, and the Confederates slowly retired into Virginia once more.

Yet the victory was not very great, and the cost of life had been frightful. Indeed, so many brave men had fallen upon this dreadful field that the thought came to the governor of the state that it would be well to make a portion of it into a soldiers' burial place and thus consecrate it forever as holy ground. All the states whose sons had taken part in the battle willingly helped, and it was dedicated a few months after the battle. And there President Lincoln made one of his most

beautiful and famous speeches, known today as the Gettysburg Address:

"Fourscore and seven years ago, our fathers brought forth on this continent a new nation, conceived in liberty, and dedicated to the proposition that all men are equal. Now we are engaged in a great civil war, testing whether that nation, or any nation so conceived, and so dedicated, can long endure. We are met on a great battlefield of that war. We have come to dedicate a portion of that field, as a final resting-place for those who here gave their lives that that nation might live. It is altogether fitting and proper that we should do this. But, in a larger sense we cannot dedicate—we cannot consecrate—we cannot hollow—this ground. The brave men, living and dead, who struggled here, have consecrated it, far above our poor power to add or detract. The world will little note, nor long remember, what we say here, but it can never forget what they did here. It is for us, the living, rather, to be dedicated here to the unfinished work which they who fought here have thus far so nobly advanced. It is rather for us to be here dedicated to the great task remaining before us—that from these honored dead we take increased devotion to that cause for which they gave the last full measure of devotion—that we here highly resolve that these dead shall not have died in vain—that this nation, under God, shall have a new birth of freedom—and that government of the people, by the people, for the people, shall not perish from the earth."

*—Adapted from This Country of Ours,
by Henrietta Elizabeth Marshall*



An engraving of General Pickett's famous charge at Gettysburg, by Alfred Swinton after Alfred Waud

The Artios Home Companion Series

Unit 4: The Civil War Rages On

Teacher Overview

AFTER THE BATTLE of Gettysburg proved to be the deciding battle of the war and effective changes were made in leadership, it was only a matter of time until the end and one side emerged triumphant.



Siege of Vicksburg--13, 15, & 17 Corps, Commanded by Gen. U.S. Grant, assisted by the Navy under Admiral Porter—Surrender, July 4, 1863, by Kurz and Allison (c.1888)

Suggested Assignments

In this unit, students will:

- Complete two lessons in which they will learn about the **American Civil War** from the **Siege of Vicksburg** through the **close of 1864**, journaling and answering discussion questions as they read.
- Define vocabulary words.
- Complete a biography notebook page on the early life and military career of **Ulysses S. Grant**.
- On a map containing Georgia and Tennessee, track the Battles of **Chickamauga**, **Lookout Mountain**, and **Missionary Ridge**.
- Find and read the poem “**Sheridan’s Ride**,” by Thomas Buchanan Read.
- Continue adding to their list of generals involved in the war, creating a bullet point list under each one that includes the battles they were involved in and the results of those battles. *This will be due at the end of Unit 5.*
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

Honesty is a character quality to be desired.

The integrity of the upright guides them, but the crookedness of the treacherous destroys them.

– Proverbs 11:3

God hates ungodliness and slavery.

Now we know that the law is good, if one uses it lawfully, understanding this, that the law is not laid down for the just but for the lawless and disobedient, for the ungodly and sinners . . . enslavers, liars, perjurers, and whatever else is contrary to sound doctrine.

– 1 Timothy 1: 8-10

God created all human beings equal in His sight. Although we may have different and individual God-ordained purposes, God sees us as equal.

There is neither Jew nor Greek, there is neither slave nor free, there is no male and female, for you are all one in Christ Jesus.

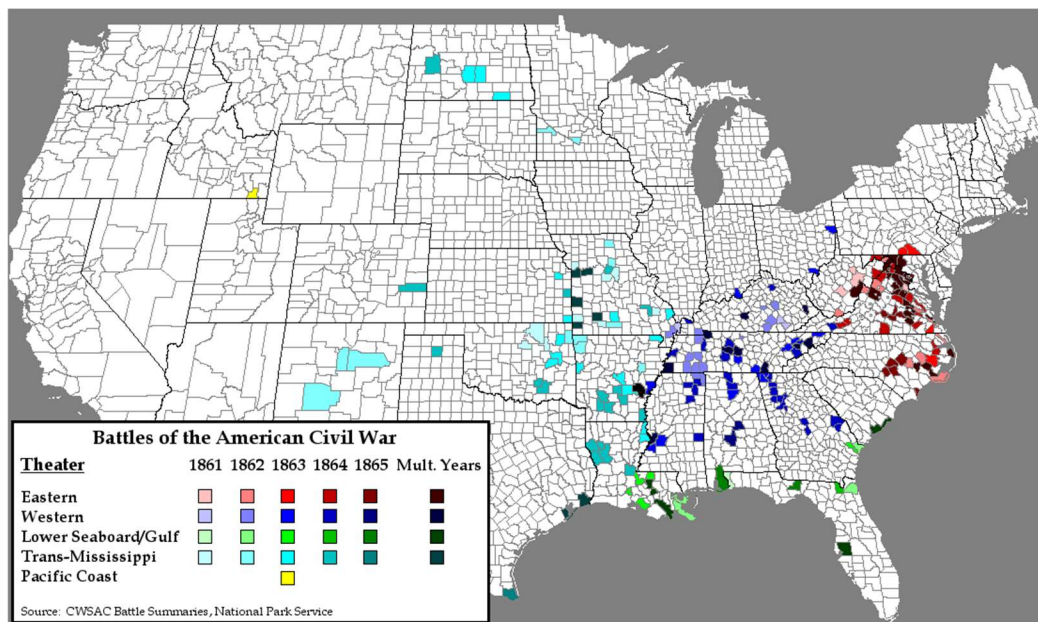
– Galatians 3:28

Lesson One

History Overview and Assignments From Vicksburg Through the Close of 1863

“By the close of 1863, Lee’s invasion had been repelled, the Mississippi was opened and patrolled by Union gunboats, the blockade of the southern ports was more effective than ever, and the strong position of Chattanooga was securely held by the Union army.”

– from the adapted article below



County map of Civil War battles by theater and year

Reading and Suggested Assignments

- Review the discussion questions and the vocabulary then read the combined article: *The Civil War: 1863* and *In the Center With Rosecrans, Thomas, and Grant*.
- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary word in the context of the reading. Write the word and its definitions in the vocabulary section of your history notebook.
- On a map containing Georgia and Tennessee, track the **Battles of Chickamauga, Lookout Mountain, and Missionary Ridge**.
- Continue adding to your list of generals involved in the war, creating a bullet point list under each one that includes the battles they were involved in and the results of those battles. *This will be due at the end of Unit 5.*
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Vocabulary

demoralize

Key People, Places, and Events

Ulysses S. Grant
William T. Sherman
John C. Pemberton
Capture of Vicksburg
William Rosecrans

Braxton Bragg
Philip Sheridan
George Henry Thomas
Battle of Chickamauga

Joseph “Fighting Joe” Hooker
Ambrose Burnside
Battle of Lookout Mountain
Battle of Missionary Ridge

Discussion Questions

1. List the events that led to the Fall of Vicksburg.
2. Why was the capture of this city important to the Federals?
3. Describe the battles of Chickamauga, Lookout Mountain, and Missionary Ridge.
4. What was the situation like for both sides at the end of 1863?

Adapted for High School from the book:

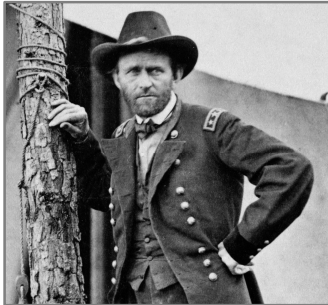
A History of the United States

by William M. Davidson

The Civil War: 1863

and

The Rise of General Lee and the Fall of McClellan, Part Two



General Ulysses S. Grant, by Edgar Guy Fawx (1864)

IN THE WEST—GRANT AND VICKSBURG

Campaign Against Vicksburg

The Confederates held the Mississippi River from Vicksburg to Port Hudson, and the Federals needed to wrest it from them. Vicksburg was the key to the Mississippi River. In the autumn of 1862, General **Ulysses S. Grant** had directed **William T. Sherman** to descend the river from Memphis with a fleet under Porter and capture the city, while he himself moved south into Mississippi, intending to keep **John C. Pemberton**, commander of the Confederate forces in that state, engaged as far from Vicksburg as possible. A Confederate force under General Van Dorn, however, captured Holly Springs, Grant's depot of supplies, thereby cutting off the Union line of communication with the North and defeating Grant's plan.

Sherman, not informed of this misfortune, moved down the Mississippi, landed on the Yazoo River, and made an unsuccessful attack upon the fortifications some miles above Vicksburg. This effort failing, Grant resolved on a second plan and in January 1863, massed the Union troops on the west bank of the Mississippi, opposite Vicksburg. Deciding that the only successful plan would be to attack the city from the South, Grant determined to run the batteries at Vicksburg, and on the night of

April 16 a fleet under Porter performed this dangerous and daring feat, with the loss of but one of Porter's boats. The army marched south on the west bank of the river, crossed it, and on the 29th of April, landed at a point about twenty miles south of Vicksburg. Port Gibson was captured on May 1, and an engagement won at Raymond on May 12.

Grant then advanced on Jackson, the state capital of Mississippi, where all railroads communicating with Vicksburg connected. General Joseph E. Johnston gave battle at that point, but after a severe engagement the Confederates fled, and the Union troops entered the city. Grant now turned westward toward Vicksburg, thus separating the forces of Johnston and Pemberton. Grant defeated Pemberton in a hard-fought battle at Champion Hill on May 16, and on the following day routed him at Big Black River. Pemberton now retired to the entrenchments at Vicksburg, caught like a mouse in a trap.

Grant stationed his batteries ready for action and sent word to Porter to open fire on the riverfront. As the first shot rang out from the fleet, Grant ordered an assault, but the gallant charge was repulsed with great loss. Hereupon Grant gave up all thought of storming the strong fortification and settled instead on a siege of Vicksburg, which lasted for forty-three days. By the 3rd of July Pemberton was starved out and raised the white flag above his works. On the following day Vicksburg fell, Pemberton surrendering 31,600 men as prisoners of war.

Effects of the Fall of Vicksburg

A few days later Port Hudson surrendered, and the work of Grant in the Mississippi Valley was accomplished—the great river was no longer open from its source to its mouth, and the Confederacy was cut in two. One of the chief plans of the war had thus been accomplished. The success of the Union

armies in the West was due to the skill and persistent efforts of one great man, General Ulysses S. Grant, who was now given the rank of major-general in the Union army. The **Capture of Vicksburg** completed his service in the Mississippi Valley.

IN THE CENTER: WITH ROSECRANS, THOMAS, AND GRANT

Rosecrans Enters Chattanooga

All during the winter and spring following Murfreesboro (January 1863), the Union army of **William Rosecrans** lay encamped on the field so bravely won, while **Braxton Bragg**'s southern army still camped in Tullahoma. Finally, on June 24 Rosecrans began the forward movement which later led to that brilliant campaign in the center of which were engaged the four great generals—Ulysses S. Grant (the hero of the victories in Mississippi), William T. Sherman (who had so ably assisted in these victories), Major General **Philip Sheridan** (the brilliant cavalry officer), and Major General **George Henry Thomas** (whose unflinching courage and endurance soon made him one of the chief commanders in the army of the center).

By September, Rosecrans “had skillfully maneuvered Bragg south of the Tennessee River, and through and beyond Chattanooga,” and had himself taken possession of that city.

Battle of Chickamauga—September 19-20

When Bragg passed through the gaps of Missionary Ridge in his flight from Chattanooga, Rosecrans pushed on to overtake him; but, learning that the Confederate army was concentrating in northwestern Georgia, Rosecrans gave up the chase. Bragg was reinforced and now took the initiative.

On September 18, the two armies faced each other in the **Battle of Chickamauga**, a few miles southeast of Chattanooga. Here on September 19 and 20 one of the bloodiest battles of the war was fought. All day long the Union army resisted the fierce attacks of the southern columns—charges and counter-charges were made—and by nightfall of the 19th the Confederates had failed to gain the road to Chattanooga, but they held many of their positions and were ready to renew the battle the next day.

The battle opened on the 20th with an attack upon the Union left. Five Union brigades were swept from the field, and others were caught in the mad rush toward Chattanooga. On swept the Confederate troops, until they faced the new Union line on the

wooded crest of Snodgrass Hill. Here from three o'clock in the afternoon until night put an end to the struggle, the indomitable Thomas held his ground, attacked on flank and front. Up the slope of the hill charged the Confederates, giving the southern yell—only to be mowed down with frightful slaughter. Again and again they charged, but Thomas, christened on that day “The Rock of Chickamauga,” stood his ground and at night withdrew toward Chattanooga. Seldom has history recorded a more gallant defense than that made by Thomas and his brave troops at Chickamauga.



Battle of Chickamauga, by Kurz and Allison (c.1890)

After the Battle of Chickamauga

Bragg at once proceeded to shut up the Union army in Chattanooga. This city lies on the south bank of the Tennessee River at the northern end of the narrow valley through which runs Chattanooga Creek. The valley is bounded on the east by Missionary Ridge and on the west by Lookout Mountain, rising abruptly from the river, which flows south from the city and at the foot of this mountain makes a sharp turn to the North again.

Bragg's troops were stationed along the crest and slope of Missionary Ridge for some miles to the south, thence west across Chattanooga Valley to Lookout Mountain, which they held and fortified. Confederate pickets along the river guarded the road over which supplies could most easily be brought to the city. All railroad communication had been cut off and the Union men were on half-rations.

Grant Assumes Command

But all was soon to change. General Rosecrans was removed, and Thomas was put in his place. Grant was summoned to Chattanooga to take command of the department of the Mississippi. Sherman and many of the troops from Vicksburg were hastening to the relief, and General **Joseph “Fighting Joe” Hooker** had been sent with troops from the army of the Potomac. Grant's first concern upon his arrival was to bridge the Tennessee River and bring in an abundant supply of food and

ammunition. **Ambrose Burnside** was hastening southward through eastern Tennessee, and Bragg made his fatal mistake of sending 20,000 troops under the able corps commander, Longstreet, to Knoxville to capture Burnside.

Reinforcements having arrived, Grant decided to attack. With the booming of cannon on the afternoon of October 23, Thomas' troops made a dashing charge on the Confederate fortifications in the valley, and the Union line was advanced about a mile.

Battle of Lookout Mountain—November 24

In the early morning of the 24th, General Hooker advanced to drive the Confederates from their position on **Lookout Mountain**. The pickets were taken and the gallant Hooker—while a heavy mist enveloped the mountain—led his troops up the steep and wooded western slopes. Only the incessant rattle of musketry told Grant at his position on Orchard Knob that the battle—this famous “Battle above the Clouds”—was raging. The Confederates evacuated during the night, and the morning sun greeted the flag of the Union on the crest of Lookout Mountain. Sherman, under cover of mist, had gained the north base of Missionary Ridge, and the Confederate attack was not able to dislodge him.



Battle of Lookout Mountain,
1889 lithograph by Kurz and Allison

Battle of Missionary Ridge—November 25

On the morning of the 25th Bragg's forces were massed on **Missionary Ridge**, with a strongly entrenched line on the crest, another midway up the slope, and a third at the base. General Grant had planned for Hooker to attack the Confederate left while Sherman pressed on from his position on the right. But the southern army, retreating across the valley from Lookout Mountain, had burned the bridges across the creek and it was late in the afternoon before Hooker could reach the ridge.

Sherman attacked early in the morning, but by three o'clock was so hard-pressed that Grant gave the

signal for an attack by Thomas' brave troops. Advancing at double quick, Thomas' men carried the rifle pits, and Union and Confederate troops went over the first line of defenses almost at the same time. There was no halting, no waiting for further orders, no re-forming of lines, but up the steep slope, covered with fallen timbers and boulder, Thomas' troops advanced. The second line of works was carried, and on they swept to the crest. The crest was gained, and the cannon turned upon the retreating, panic-stricken Confederate troops, thousands of whom threw away their arms in their mad flight, and many were taken prisoner. By night Bragg's **demoralized** army was in full retreat, and Grant had opened another gateway to the South.

Burnside at Knoxville

Meanwhile, Burnside had taken possession of Knoxville and Longstreet had made an unsuccessful attack upon the town. When the news reached him of Bragg's disaster, Longstreet immediately abandoned the siege and on the night of December 4 hastened northward to rejoin Lee. Eastern Tennessee was thus saved for the Union, and the President's anxiety for the loyal people of this state was eased.

SITUATION AT THE CLOSE OF 1863

As has been stated earlier, Gettysburg was the turning point of the war. At the very moment Pickett's men were meeting their bloody repulse on the slope of Cemetery Ridge up north, General John Pemberton was flying the white flag above his fortification at Vicksburg down south.

On July 5 Lee gathered together his now shattered and crippled army and retreated down the passes of the Blue Ridge through the Shenandoah Valley, to his old camping ground in Virginia, across the Rappahannock. Meade gave chase, but slowly. In a few weeks he, too, arrived on the soil of Virginia and encamped across the river from Lee's position. Here the two armies remained, watching one another, cautiously seeking an opportunity to strike. Efforts failing, both armies went into winter quarters and remained practically inactive until the following spring.

Thus, by the close of 1863, Lee's invasion had been repelled, the Mississippi was opened and patrolled by Union gunboats, the blockade of the southern ports was more effective than ever, and the strong position of Chattanooga was securely held by the Union army.

Lesson Two

History Overview and Assignments The Civil War, 1864

“The situation by the end of 1864 showed that the Confederacy was fast going to pieces. Grant still kept up his siege at Petersburg, drawing the line tighter and tighter. Sheridan had destroyed Early’s army and laid waste the Shenandoah Valley. Thomas had broken Hood’s army at Nashville. Sherman was encamped at Savannah after having cut the Confederacy in twain a second time. The Confederacy, now twice severed, with all communication with the outside world cut off, was practically starving to death. The end of the great rebellion was near at hand.”

– from the adapted article below



Battle of Atlanta, by Kurz & Allison

Reading and Suggested Assignments

- Review the discussion questions and vocabulary, then read the article: *The Civil War, 1864*.
- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Complete your biography notebook page on the early life and military career of **Ulysses S. Grant**.
- Find and read the poem “**Sheridan’s Ride**” by Thomas Buchanan Read.
- Continue adding to your list of generals involved in the war, creating a bullet point list under each one that includes the battles they were involved in and the results of those battles. *This will be due at the end of Unit 5.*
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Vocabulary

confer

forage

Key People, Places, and Events

Ulysses S. Grant
William T. Sherman
Joseph E. Johnston
Atlanta Campaign
John B. Hood
Chattanooga and Atlanta Railroad
George Henry Thomas

Battle of Nashville
Sherman’s March to the Sea
CSS *Tennessee*
David G. Farragut
USS *Hartford*
Battle on Mobile Bay
CSS *Alabama*

USS *Kearsage*
Battle of the Wilderness
Battle of Spotsylvania Courthouse
Jubal A. Early
Battle of Winchester
Radical Republicans

Discussion Questions

1. Describe Grant's plan to capture Lee's army and ravage the South.
2. Describe the events upon Sherman's entrance into Atlanta.
3. What type of damage did Sherman do as he marched his troops through the South?
4. What was the result to the South because of Grant's successful plan?
5. How did England aid the cause of the South?
6. What did Lee say of the army of the Potomac once Grant was made its general?
7. Name one way God's Kingdom was advanced during the war.
8. What government action earned Lincoln strong criticism? Why?

Adapted for High School from the book:
History of the United States
by William M. Davidson
The Civil War: 1864

Plan of Operations For 1864

One day in the spring of 1864, two men conferred in the parlor of a prominent hotel in Cincinnati. Spread out on a table before them lay some especially prepared military maps, which both were eagerly scanning. Before the meeting ended, the two parties to this conference had decided upon the plan of operations for the Union armies in 1864. These two men were Union generals—one of them **Ulysses S. Grant**, the other, **William T. Sherman**. Grant, with the army of the Potomac, was to capture Lee's army; while Sherman was to carry the ravages of war into the heart of the Confederacy, capture Johnston's army, touch at some point upon the Atlantic coast, and then march northward to intercept Lee, should he attempt to escape from Grant at Richmond.

IN THE HEART OF THE CONFEDERACY

Sherman's Campaign Against Atlanta—May 5 to September 2, 1864

When Sherman parted with his superior in Cincinnati, he hastened south, determined to move as soon as possible to accomplish his part in this gigantic campaign. On the Confederate side, General **Joseph E. Johnston** was in command of the southern army in Georgia. On the 5th of May, the same day that Grant moved to begin his part of the campaign, Sherman started south with his force of 100,000 men to attack Johnston, who was fortified at Dalton in northern Georgia.

Now began the **Atlanta Campaign**—a series of brilliant engagements in which Sherman by his favorite flank movement caused Johnston to fall back from one position to another until, by the latter part of July, the Confederates had been driven within

the entrenchments at Atlanta. At Dalton, Resaca, Altoona, Dallas, Kennesaw, Lost Mountain, and many other places, the Union forces had been successful, but they had met with stubborn resistance, and now at Atlanta a siege was to be kept up for more than a month. Tired of Johnston's policy of retreating, Jefferson Davis removed Johnston from command and put General **John B. Hood** in charge of the Confederate forces at that point.



The Siege of Atlanta, by Thure de Thulstrup (c.1888)

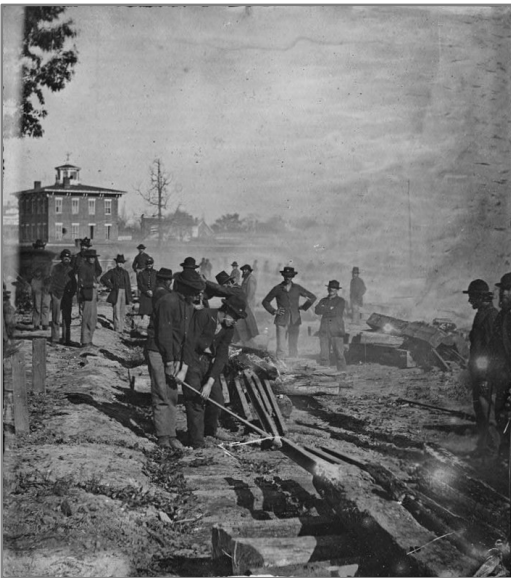
Sherman Enters Atlanta—September 2

This change in command of the Confederate army meant a change of policy. General Hood soon made a furious charge upon the Union army on July 20, but after an hour's engagement was severely repulsed and forced to fall back within his lines. Two days later he attacked a second time but was again driven back into the city after suffering the loss of about 10,000 of his men.

Sherman now prepared to cut off Hood's communications by marching around Atlanta, capturing its railroads on the east and south, and then taking the city from the rear. But, on September 2, Hood evacuated the city and fled, and the Federal army at once took possession.

Hood Turns Northward—Battle of Nashville—December 15 and 16

On evacuating Atlanta, Hood first marched to the southwest, and then boldly turned northward, threatening Sherman's line of communication. After destroying about twenty miles of the **Chattanooga and Atlanta Railroad**—the only route over which supplies could reach Sherman—with the evident intention of invading Tennessee and thus drawing Sherman after him, Sherman at once dispatched General **George Henry Thomas** to Nashville with a large body of troops to intercept Hood. Thomas arrived none too soon, for in the middle of November Hood crossed the Tennessee River and eagerly began his northward march.



Sherman's men destroying a railroad in Atlanta (1864)

The Battle of Nashville

At Columbia, a skirmish took place between Hood's army and a detachment of Thomas's force. On the last day of November, a desperate and sanguinary battle ensued at Franklin, where Hood's army was badly shattered. Urged on as if by some relentless fate, Hood reached Nashville and formed his line of battle in front of the entrenchments of the ever cautious but invincible Thomas.

As time went by and Thomas did not attack Hood, the whole country became alarmed. But Thomas had the courage to wait until he felt prepared to attack; and the result of the **Battle of Nashville** fought on December 15 and 16 was his justification for his delay.

When Thomas burst upon Hood's soldiers, they fled in utter rout, leaving on the field their dead and wounded, their artillery, and their arms. So complete

was the destruction of Hood's army that never again was it successfully reorganized.



Battle of Nashville,
chromolithograph by Kurz & Allison (c.1888)

Sherman's March to the Sea— November 15 to December 22

When Hood turned northward, Sherman planned to march forth into the very heart of the Confederacy, live off the land, reach and take some seacoast city, then turn northward and join Grant in the vicinity of Richmond.

After resting his troops, Sherman was ready to advance. First, he destroyed the railroad connecting Atlanta with Chattanooga. Then he applied the torch to all public buildings in Atlanta, cut the telegraph wires, and with this magnificent army of 60,000 as well trained and intelligent men "as ever trod the earth," swung off on November 15 on his famous march from Atlanta **to the sea**. The army marched in four parallel columns, only a few miles apart, advancing about fifteen miles a day. Each brigade detailed a certain number of men to gather supplies of **forage** and provisions.

After starting off on foot in the morning, these foragers would return in the evening mounted on ponies or mules or driving a family carriage loaded outside and in with everything the country afforded. Railroads were torn up and the rails heated and twisted, bridges were burned, and the fertile country for thirty miles on either side of the line of march was laid to waste. Georgia's soldiers were in the North, so this army met with little resistance.

When next the North heard from Sherman, he was in front of Savannah. Savannah was evacuated, and Sherman entered on December 22. The Confederacy had again been cut in half. Georgia, with her arsenals and factories, had been the workshop of the South. Sherman had followed the Confederates to their "inmost recess," and had shown the world

how feeble was their power, how rapidly their doom was approaching.



Sherman's March to the Sea,
engraving by Alexander Hay Ritchie (1868)

Farragut Enters Mobile Bay—August 5

Mobile, Alabama was the stronghold of the Confederacy on the Gulf. Two strong forts on low-lying sand points guarded the entrance to Mobile Bay, thirty miles below the city. Within the harbor lay a Confederate fleet, and among its vessels the monster ironclad ram, **CSS Tennessee**. Admiral **David G. Farragut**, the hero of New Orleans, determined to force an entrance to this bay. About six o'clock on the morning of August 5, he advanced to the attack. Soon one of his leading vessels was sunk by the explosion of a torpedo, but Farragut, lashed to the rigging¹ of his flagship the **USS Hartford**, boldly took the lead and passed through the torpedo line followed by his fleet.



Battle of Mobile Bay, Alabama,
by Julian Oliver Davidson (1886)

The forts were soon safely passed. In the engagement with the Confederate fleet, two of their vessels were captured, and the powerful ironclad **Tennessee** was so badly disabled that, after an engagement of an hour and a quarter, she ran up her white flag. A few days into the **Battle of Mobile Bay**, the forts at the entrance to the harbor

surrendered, but the city itself remained in the possession of the Confederates until the following year.

England and the Confederate Cruisers

During the war, the English authorities quietly allowed the building of Confederate cruisers in English dockyards. Notwithstanding the protest of the American government, these privateers were permitted to leave English ports to prey upon the commerce of the United States. There were six or eight of these cruisers which constantly harassed American commerce. The *Shenandoah* is said to have destroyed or captured more than \$6,000,000 worth of American property on the high seas. It was the custom of these cruisers to avoid encounters with American men-of-war, but to assail, wherever and whenever they could, American merchantmen. Millions of dollars' worth of property was thus taken or destroyed by these English built cruisers, and American commerce was practically driven from the seas. The attitude of the English authorities in thus extending sympathy and aid to the Southern rebellion created the most hostile feeling in the United States against England.



Battle of the Kearsarge and Alabama,
by Xanthus Russell Smith (1882)

The Kearsarge and the Alabama

The most famous of these cruisers was the **CSS Alabama**, under Captain Raphael Semmes, who before the rebellion was an officer of the United States Navy. Semmes was the most daring of the Confederate sea-rovers. He at first commanded the *Sumter*, and later become commander of the *Alabama*.

When that cruiser was building at Liverpool, Charles Francis Adam, minister of England, had protested against its leaving British waters, but in spite of this protest, the *Alabama* was permitted to slip away to the Azores Islands, where Semmes and a Confederate crew were in waiting to receive her.

She destroyed American commerce right and left, taking millions of dollars' worth of American prizes. On the 19th of June 1864, the *Alabama* encountered the **USS *Kearsarge***, under command of Captain John A. Winslow, off the coast of Cherbourg, France. After an hour's engagement, the *Alabama* was so disabled that she ran up the white flag and soon afterward sank.

IN THE EAST

Grant's Plan

Grant was now in command of all the Union forces under arms on the continent. He took up his headquarters with the army of the Potomac, and a little after midnight on the 4th of May 1864, set that army of 120,000 men in motion across the Rapidan River. He then sent a telegram to Sherman to start from Chattanooga and carry out his part of the plan agreed upon at the Cincinnati conference, and another telegram to Butler at Fortress Monroe to move up the James River to City Point below Richmond and hold that as a base of supplies in anticipation of Grant's reaching the James with the army of the Potomac.

Grant's plan was to begin a forward movement of all these armies, with a view to pounding the Confederate armies until they surrendered, or the Confederacy went to pieces. After the first battle across the Rapidan, Lee remarked, "The army of the Potomac at last has a general who will not retreat."

Battle of the Wilderness—

May 5 and 6

Grant had no sooner crossed the Rapidan and moved down toward the region where Hooker had met such severe repulse at Chancellorsville than Lee fell furiously upon the army of the Potomac, determined to drive it back across the river. In the two days' bloody battle that followed, on May 5 and 6, Grant himself says no greater fighting was ever witnessed on the continent. The **Battle of the Wilderness** took place in a wild lonely region known by that name, where the country for miles around is covered with a dense growth of cedar and scrub oak so closely compacted as to prevent the free and easy movement of troops. At the end of the two days' struggle, Lee retired to his entrenchments, and Grant, content to leave him there, began his famous series of movements "by the left flank" with a view to forcing his army in between Lee and his communication at Richmond. Lee, detecting his

movement, hastily forsook his entrenchments and, being perfectly familiar with the geography of the Wilderness, soon planted himself squarely in front of Grant's line at Spotsylvania Courthouse.

The Battle of Spotsylvania Courthouse—

May 9-12

Here for three days the furious **Battle of Spotsylvania Courthouse** raged in a country as wild as that in which the army had fought so desperately on the 5th and 6th of May. The battle ended at nightfall of the 12th of May, Lee falling back to a new position on the following morning. For eight days—from May 5 to 12—the two armies had been constantly under fire, with Grant steadily pressing nearer Richmond. "The men toiled all day at the work of slaughter, lay down to sleep at night, and rose to resume the bloody labor in the morning, as men do in the ordinary peaceful business of life." The dead and the wounded on both sides numbered into the thousands, and the ambulance train carrying the dying and wounded loyal soldiers of the North made one long continuous line from Spotsylvania to Washington.



Battle of Cold Harbor, by Kurz & Allison (c.1888)

North Anna—May 23-25:

Cold Harbor—June 3

At Spotsylvania, Grant rested a week on account of the rains. On the 19th of May, he moved toward the North Anna River, and in crossing it divided his army into two divisions. Lee at once saw his advance and forced his Confederate army between the now divided Union forces. Several encounters on May 23-25 between the contending forces convinced Grant that it would be the part of wisdom to withdraw north of the stream. This he did at once, but he was no sooner across than he marched southeasterly along the course of the North Anna to its junction with the Pamunkey River. He successfully crossed the latter stream in the vicinity of Hanover and at once pushed forward in a southeasterly direction to Cold Harbor, ten miles from Richmond. Here he

again found Lee strongly entrenched. On the morning of June 3, Grant gave battle, but he met with a bloody repulse, his loss in killed and wounded amounting to more than 5,000 men.

Change of Base from the York to the James River

Grant now gave up all hope of immediately taking Richmond and resolved to change his base from White House on the Pamunkey River to City Point on the James—a similar movement to the one accomplished by McClellan in 1862. While this movement was in progress under the direction of his army and the navy, Grant lay in front of the entrenchments at Cold Harbor and for ten days put forth every effort to induce Lee to come out and fight him in the open. Failing in this, he resumed his southward march, reaching the James River on the 14th of June.

The Race to Petersburg

Now began a race between the two armies for the possession of Petersburg—a point twenty miles south of Richmond and an important railroad center connecting with the Confederate capital. Before the Union soldiers attacked, Petersburg was strongly reinforced by Lee, who now took personal command of the defense of that city. An attempt was made by Meade on the 18th of June to carry the Confederate works by assault, but Meade was repulsed with great loss of life. Grant, anxious to save the lives of his men, finally resolved on taking Petersburg by siege, thereby repeating the scenes so familiar to him at the siege of Vicksburg.

IN THE SHENANDOAH VALLEY

Early's Raids

In the latter part of June, Lee, hoping to draw off some of Grant's troops from the vicinity of Richmond, sent General **Jubal Anderson Early** northward to threaten Washington. On the 11th of July, Early arrived before the city, but delayed his attack until the following day. That night reinforcement came from Grant, and the city was saved. Early retired, but in the latter part of July he again pressed northward—this time into the Shenandoah Valley. He drove the Union forces from that valley and swept across the Potomac into Maryland—a portion of his force advancing as far north as Chambersburg, Pennsylvania.

The Shenandoah Valley was a rich field for

foraging, and since 1862 had been the scene of constant raids on the part of the Confederates. Grant, weary of annoyance from that quarter, sent Sheridan with an army in quest of Early. Sheridan soon appeared upon the scene, and during the month of September destroyed or captured over half of Early's army. Sheridan, acting under orders from Grant, now proceeded to lay waste this splendid agricultural valley from its source northward to the Potomac River, in order that it could be no more used by Confederate raiders as a base of operations against Washington. So effectually was Sheridan's work done that it was said at the time that even a crow could not subsist in the Shenandoah Valley without bringing rations with him. Unaware of this complete devastation, Early once more made a raid northward into the valley for the purpose of securing needed forage for Lee's army at Richmond.



Sheridan's Final Charge at Winchester,
by Thure de Thulstrup (c.1886)

The Battle of Winchester—October 19

On his arrival in the valley, Early learned that the Union army was encamped at Cedar Creek in the northern end of the valley. On the night of the 18th of October, he succeeded in creeping around this army, and, at the early dawn of the morning of the 19th, fell upon Sheridan's troops, taking them completely by surprise. General Horatio Wright, the commanding officer on the ground, unable to stop the panic that ensued, ordered a retreat to Winchester—twenty miles away.

Sheridan, at the time the battle began, was at Winchester. Having learned of Early's return to the valley, he fully suspected what was the cause of the cannonading in the direction of Cedar Creek. Hastily calling for his horse, he mounted and was off at full speed on that famous ride told so thrillingly in verse by Thomas Buchanan Read in his poem, "Sheridan's Ride." A little before the hour of noon Sheridan arrived upon the scene, his steed white with foam. As he faced his straggling troops he rose on his stirrups

with the greeting—“Turn, boys, turn; we’re going back!” His presence acted like magic upon his troops—the lines were instantly re-formed and awaited Early’s attack. Under the personal leadership of Sheridan, his troops were invincible. Early was repulsed with such spirit that nearly the whole of his army was destroyed. Never again did the Confederates attempt to renew the war in the Shenandoah Valley.

SITUATION AT THE CLOSE OF 1864

The situation at the close of the year 1864 showed that the Confederacy was fast going to pieces. Grant kept up his siege at Petersburg, drawing the line tighter and tighter. Sheridan had destroyed Early’s army and laid waste the valley of the Shenandoah. Thomas had broken Hood’s army at Nashville. Sherman was encamped at Savannah after having cut the Confederacy in twain a second time. The *Alabama*, the last of the formidable Confederate cruisers, had ended her career in destruction and American commerce could once more feel free on the high seas. The great and powerful North was still as vigorous as ever, and its armies were now being led by some of the greatest generals the world had ever known. The Confederacy, now twice severed, with all communication with the outside world cut off, was practically starving to death. The end of the great rebellion was near at hand.

The Spirit of God

Powerful movements of God’s Spirit were reported during the Civil War. Christians served on

both sides. Some of the most well-known include Generals Robert E. Lee and “Stonewall” Jackson of the South, as well as Admiral Andrew Foote of the North. Frequent revivals swept through the Southern armies, and chaplains reported thousands of conversions and baptisms—a clear example of God using a sin-drenched upheaval of history to accomplish one of His glorious purposes, the furtherance of His Kingdom.

Criticisms of Lincoln

While Lincoln enjoyed strong support throughout the North, he drew strong criticism for several things. A faction of the Republican Party known as the **Radical Republicans**, who had long held the goal of immediate, complete, and permanent eradication of slavery, had been critical of Lincoln from the time of his presidential campaign regarding his moderate stance toward slavery. They had opposed Lincoln’s selection of McLellan for top command, and his efforts to bring seceded states back into the Union quickly and easily. Now they, along with others, strongly criticized what many called abuses of power in circumventing the limits placed upon him by the Constitution. For example, he suspended writs of *habeas corpus*, thereby allowing a suspect to be arrested without being charged with a crime or granted a trial. (The authority to do this was limited to Congress by the Constitution.) This, naturally, led to abuses. More importantly, however, it laid the groundwork for further, gradual amassing of power into the hands of the federal government and in particular, the executive branch.

NAME OF BATTLE	Place Where Fought	Date	Commanding General of Union Army	Commanding General of Confederate Army
Chancellorsville	Chancellorsville, Va.	May 2-3	Maj.-Gen. J. Hooker	Gen. R. E. Lee
Gettysburg	Gettysburg, Pa.	July 1-3	Maj.-Gen. G. G. Meade	Gen. R. E. Lee
Vicksburg	Vicksburg, Miss.	July 4	Maj.-Gen. U. S. Grant	Lieut.-Gen. J. C. Pemberton
Port Hudson	Port Hudson, La.	July 8	Maj.-Gen. N. P. Banks	Maj.-Gen. F. Gardner
Chickamauga	Chickamauga, Ga.	Sept. 19-20	Maj.-Gen. W. S. Rosecrans	Gen. B. Bragg
Chattanooga	Chattanooga, Tenn.	Nov. 23-25	Maj.-Gen. U. S. Grant	Gen. B. Bragg
Knoxville	Knoxville, Tenn.	Dec. 4	Maj.-Gen. A. E. Burnside	Lieut.-Gen. J. Longstreet

Important Battles of 1863

NAME OF BATTLE	Place Where Fought	Date	Commanding General of Union Army	Commanding General of Confederate Army
Wilderness	Wilderness, Va.	May 5-6	Lieut.-Gen. U. S. Grant	Gen. R. E. Lee
Resaca	Resaca, Ga.	May 14-15	Maj.-Gen. W. T. Sherman	Gen. J. E. Johnston
Cold Harbor	Cold Harbor, Va.	June 3	Lieut.-Gen. U. S. Grant	Gen. R. E. Lee
Atlanta	Atlanta, Ga.	July 22	Maj.-Gen. W. T. Sherman	Gen. J. E. Johnston
Petersburg	Petersburg, Va.	July 30	Lieut.-Gen. U. S. Grant	Gen. R. E. Lee
Mobile Bay	Mobile, Ala.	Aug. 5	Rear-Admiral D. G. Farragut	Admiral F. Buchanan
Winchester	Winchester, Va.	Oct. 19	Maj.-Gen. P. H. Sheridan	Lieut.-Gen. J. A. Early
Cedar Creek	Cedar Creek, Va.	Oct. 19	Maj.-Gen. P. H. Sheridan	Lieut.-Gen. J. A. Early
Nashville	Nashville, Tenn.	Dec. 15	Maj.-Gen. G. H. Thomas	Gen. J. B. Hood

Important Battles of 1864

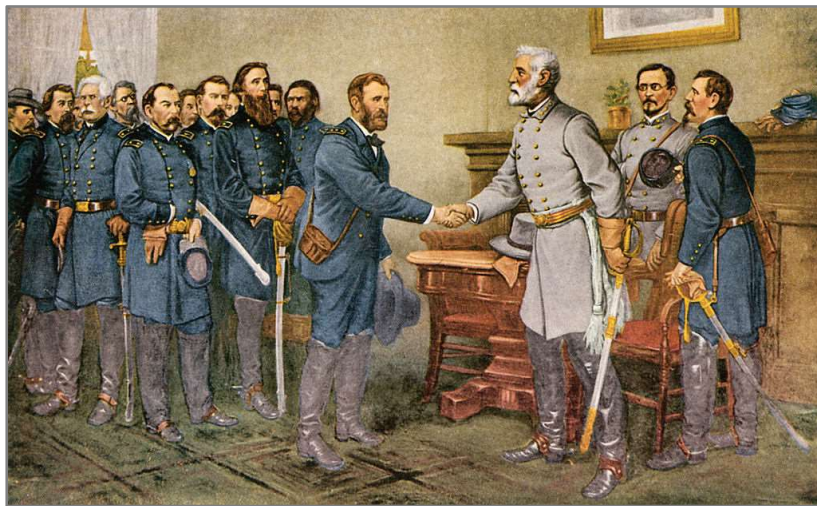
1. Rear Admiral David G. Farragut was indeed lashed to the rigging, but not out of resolve that he would “go down with the ship” if it were sunk, as is popularly related. He had climbed into the rigging to get the best view of the action, and a seaman tied him to secure him in place and prevent the possibility of a dangerous fall.

The Artios Home Companion Series

Unit 5: The Civil War's End and Its Aftermath

Teacher Overview

THE RESULTS OF America's Civil War were revolutionary in character. Slavery was abolished and the freedmen given the ballot. The Southern planters who had been the leaders of their section were ruined financially and almost to a man excluded from taking part in political affairs. The Union was declared to be perpetual and the right of a state to secede settled by the judgment of battle. Federal control over the affairs of states, counties, and cities was established by the Fourteenth Amendment. By this policy, the power and prestige of the federal government were enhanced beyond imagination. The North was now free to pursue its economic policies: a protective tariff, a national banking system, land grants for railways, free lands for farmers. Planting had dominated the country for nearly a generation. Business enterprise was to take its place.



The Surrender of General Lee to General Grant at Appomattox Court House, Virginia, 9 April 1865, by Thomas Nast

Suggested Assignments

In this unit, students will:

- Complete three lessons in which they will learn about **the conclusion and results of America's Civil War** and **the beginning of Reconstruction after the Civil War**, journaling and answering discussion questions as they read.
- Define vocabulary words.
- Continue adding to their list of generals involved in the war, creating a bullet point list under each one that includes the battles they were involved in and the results of those battles. *This will be due at the end of this unit.*
- Conduct research on the **conspiracy theories of Lincoln's assassination**.
- Do some additional research on how the **Fourteenth Amendment** expanded the power of America's federal government over the century and a half since its enactment.
- Find and read through the poem "**Abraham Lincoln**," by James Russell Lowe.
- Explore the website on Lincoln's Assassination found on their **ArtiosHCS** curriculum website.
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

Honesty is a character quality to be desired.

The integrity of the upright guides them, but the crookedness of the treacherous destroys them.

– Proverbs 11:3

God hates ungodliness and slavery.

Now we know that the law is good, if one uses it lawfully, understanding this, that the law is not laid down for the just but for the lawless and disobedient, for the ungodly and sinners . . . enslavers, liars, perjurers, and whatever else is contrary to sound doctrine.

– 1 Timothy 1: 8-10

God created all human beings equal in His sight. Although we may have different and individual God-ordained purposes, God sees us as equal.

There is neither Jew nor Greek, there is neither slave nor free, there is no male and female, for you are all one in Christ Jesus.

– Galatians 3:28

Lesson One

History Overview and Assignments The Year 1865

AS THE YEAR 1865 began, there was a striking contrast between the conditions of the Union and Confederate armies. The Confederacy was pitiable in the extreme. Its finances were in utter ruin, food products were scarce, the army was on short rations, prices for food and clothing were extremely high, there were thousands of army deserters, and the spirit which had kept the rebellion alive was rapidly disappearing. In contrast, the Union hope ran so high that all felt the end was in sight. And so it was. With the end of the war came much rejoicing, followed quickly by great national grief as the hand of an assassin took the life of President Lincoln.



The Peacemakers, by George Peter Alexander Healy (1868) portrays William Tecumseh Sherman, Ulysses S. Grant, Abraham Lincoln, and David Dixon Porter discussing plans for the last weeks of the Civil War aboard the steamer *River Queen* in March 1865.

Reading and Suggested Assignments

- Review the discussion questions and vocabulary, then read the article: *The Year 1865*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.

- Continue adding to your list of generals involved in the war, creating a bullet point list under each one that includes the battles they were involved in and the results of those battles. *This will be due at the end of this unit.*
- Find and read through the poem “Abraham Lincoln,” by James Russell Lowe.
- Do additional research on **the conspiracy theories of Lincoln’s assassination**. Prepare to share what you have learned with your class. On your **ArtiosHCS** curriculum website you will find a possible website to use.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Vocabulary

leniency magnanimous dissolute sagacious conspiracy

Key People, Places, and Events

Ulysses S. Grant	Philip Sheridan	Abraham Lincoln	John Wilkes Booth
William T. Sherman	Robert E. Lee	Appomattox Courthouse	

Discussion Questions

1. What two campaigns did General Grant plan in 1865?
2. What was the condition of the Confederacy in 1865?
3. What was the condition of the Union in 1865?
4. What was the tone of Lincoln’s Second Inaugural Address, and what words and phrases of this address demonstrate that tone?
5. Describe the fall of Petersburg and Richmond during Grant’s last campaign of the war.
6. Did the Confederacy’s president, Jefferson Davis, ever face trial?
7. What were the terms of surrender given to General Robert E. Lee and the Confederate Army at Appomattox on April 9th?
8. Describe how humility was demonstrated by both General Grant and General Lee during the surrender proceedings.
9. How do Lincoln’s famous words from 1858 (below) almost seem prophetic in retrospect? *“A house divided against itself cannot stand. I believe this government cannot endure, permanently, half slave and half free. I do not expect the Union to be dissolved—I do not expect the house to fall—but I do expect it will cease to be divided. It will become all one thing or all the other.”*
10. How did Lincoln die?
11. What were Edwin M. Stanton’s words when he saw that Lincoln had died?

Adapted for High School from the book:

History of the United States

by William M. Davidson

The Year 1865

Plan of Operations for 1865

After having thrown his army almost completely around Petersburg, General **Ulysses S. Grant** was content to let the siege drag along, awaiting the result of **William T. Sherman’s** march through Georgia and **Philip Sheridan’s** campaign in the Shenandoah Valley. As the winter wore away, the Confederate prospects became more and more desperate, Lee himself acknowledging that the rebellion was at the end of its tether. As the year 1865 opened, Grant recalled Sheridan from the Shenandoah Valley to move with his cavalry in and around Richmond, cutting the railroads and destroying supplies. He now planned two campaigns:

1) He directed Sherman to move northward through the Carolinas to the vicinity of Goldsboro, with a view of preventing reinforcements being sent to **Robert E. Lee**, and also of preventing that general’s escape, should he fly south;

2) Grant himself, with the army of the Potomac, now numbering 125,000 men, resolved on capturing both Petersburg and Richmond, and forcing the surrender of Lee’s entire army.

Condition of the Confederacy

The condition of the Confederacy at this time was pitiable in the extreme. Its finances were in utter ruin, a billion dollars of debt had been incurred without prospect of paying a cent thereof, food

products were scarce, and the condition of the people in every locality regarding food supply was desperate. The army was on short rations, some days Lee's army being almost without food. The prices paid for food and clothing and all articles of merchandise were extremely high. The Confederate army was being deserted at that time by the thousands. The age limits of service in the southern army were expanded to the range between fourteen and sixty—a fact which caused General Butler to remark that “the Confederacy was robbing both the cradle and the grave.” The spirit which had kept the rebellion alive was rapidly disappearing. With starvation staring them in the face, many in both the army and the country were ready to give up the struggle.

Condition of the Union

At no time since the beginning of the war did hopes run so high in the North; all felt that the end was in sight. While the draft had been resorted to in the North to force men into Union service, still the draft bill was of little value other than that it served to quicken the more honorable and loyal method of volunteer enlistment. Although Grant's losses in the campaign against Richmond had been enormous, yet his ranks were soon filled up and the army of the Potomac at the beginning of 1865 was in reality one of the most formidable veteran armies ever gathered together in the world. There had been years of gloom and despondency, of fault-finding, of discontent; there had been time when the fate of the Union hung in the balance; but all this passed and the whole people, now that they had time to reflect, began to realize that the nation owed its very life to the genius and lofty patriotism of the patient, kindly-natured, great-souled **Abraham Lincoln**. An effort had been put forth by the malcontents in November 1864 to defeat his reelection, George B. McClellan being the candidate against him. But the loyal North flocked to the support of the administration, and Lincoln was reelected by the largest vote which a presidential candidate had up to that time received in the history of the Republic.

Lincoln's Second Inaugural Address

Once again, on the 4th of March 1865, Lincoln stood on the east steps of the national capitol and delivered his inaugural address, closing with the memorable words:

“Fondly do we hope—fervently do we pray—

that this mighty scourge of war may speedily pass away. Yet, if God wills that it continues, until all the wealth piled by the bond-man's 250 years of unrequited toil shall be sunk, and until every drop of blood drawn with the lash, shall be paid by another drawn with the sword, as was said 3,000 years ago, so still it must be said, 'the judgments of the Lord are true and righteous altogether.' With malice toward none; with charity for all; with firmness in the right, as God gives us to see the right, let us strive on to finish the work we are in; to bind up the nation's wounds; to care for him who shall have borne the battle, and for his widow, and his orphan—to do all which may achieve and cherish a just and lasting peace, among ourselves, and with all nations.”

Sherman's Last Campaign— Johnston's Army Repulsed

While encamped in Columbia, Sherman learned that Lee had sent a detachment of his troops south to check the Union advance, and further, that General Joseph E. Johnston had been recalled to take command of these troops. He accordingly moved rapidly forward toward Goldsboro. On March 16, he came upon a part of Johnston's army near Averysboro and defeated it. On the 19th of March, he met Johnston's whole force at Bentonville, and the Confederate army again went down to defeat. On the 23rd of March, Sherman reached his objective point at Goldsboro, four hundred twenty-five miles from Savannah, where he was joined by reinforcement under General Schofield, sent in from the Atlantic coast by Grant.

Grant's Last Campaign— Fort Steadman and Five Forks

In the meantime, Grant had been impatient to force the evacuation of the two besieged cities. By the last of March, he was ready for his final movement against the entrenchments at Petersburg. Meanwhile, Lee had been planning to escape, but before doing so he resolved to strike one blow which he hoped would aid in his escape. Accordingly, on the 25th of March he assailed the Union line at Fort Steadman, but in the attempt, he signally failed, being repulsed with fearful loss. A week later Sheridan advanced on April 1 to Five Forks, in Lee's rear, south and west of Petersburg. Here Sheridan was furiously attacked, but after a hard-fought

battle, he forced nearly five thousand hungry and starving Confederate soldiers to lay down their arms and become prisoners of war.

Petersburg and Richmond Fall

On the night of April 1, Grant issued the order, and all the Union batteries began a general bombardment of the Confederate works. The heavy cannonading was kept up until five o'clock on the morning of April 2, when Grant ordered a general assault upon the Confederate left. The resistance was stubborn, but nothing could withstand the heroic charges of the Union troops.

Lee telegraphed from Petersburg to Jefferson Davis at Richmond that the two cities must be immediately evacuated. Davis received the dispatch while in his pew at church and hastily fled south. He was afterward captured in Georgia and sent as a prisoner to Fortress Monroe, to be released on bail two years later, and, through northern **leniency**, never brought to trial. Lee, gathering together his now depleted army, sought safety in flight, hoping still to unite with Johnston's army and defeat Sherman's victorious western troops before Grant could come to his assistance. The following day both Petersburg and Richmond were entered by the Union troops.

Lee Surrenders at Appomattox—April 9

Grant immediately ordered Sheridan to cut off Lee's retreat, and he himself followed close upon the heels of the Confederate army. Much fighting was indulged in between the fleeing and the pursuing armies. Lee was finally brought to bay near the town of **Appomattox Courthouse**, where, on the April 9, 1865, he surrendered his entire army as prisoners of war.

By the terms of the surrender, Lee's men were to lay down their arms and give their pledge that they would not serve against the national government until regularly exchanged. Officers were permitted to retain their side-arms, private horses, and baggage. Grant also agreed that all privates in the cavalry and artillery should be permitted to take home their own horses since they would "need them for the spring plowing." Lee spoke of the pitiable condition of his men, stating that they had been two days without food. Whereupon the **magnanimous** Grant at once sent a large drove of oxen and a wagon-train of provisions, as a freewill gift to the Confederate soldiers.

Within a few days Johnston yielded to Sherman in North Carolina, and soon all organized resistance to the authority of the national government ceased. Secession had run its course; the war of the rebellion had reached its end!

After Appomattox

Although the event had been anticipated, the news of Lee's surrender passed through the loyal states like an electric shock. The President issued a proclamation of thanksgiving, and the whole nation responded as with one voice. During all the trying period of the Civil War, a statesman—such as the nation had not known since the days of Washington—had safely conducted the affairs of state through the most perilous crisis in the history of the Republic. No greater American has yet lived than the tender-hearted, broad-gauged, generous Lincoln. His famous words uttered in 1858 now seemed like prophecy:

"A house divided against itself cannot stand. I believe this government cannot endure, permanently, half slave and half free. I do not expect the Union to be dissolved—I do not expect the house to fall—but I do expect it will cease to be divided. It will become all one thing or all the other."

Now that the Union had been restored and the country had become "all free," thoughtful and anxious men in every section of the Republic looked to the great Lincoln to point the way to the restoration of the Southern states to their old position in the Union. He had been born in the South, and as an old-time Whig had associated much with Southern leaders. He knew the temper of the Southern people as no Northern man could know it. On the afternoon of the 14th of April he dismissed his Cabinet meeting with the word, "We must now begin to act in the interest of peace."

Assassination of Lincoln

On that very night of the now historic 14th of April 1865, the country was startled by a message flashed over the wires from Washington that President Lincoln, while in attendance upon a performance at Ford's Theater, had been shot by **John Wilkes Booth**—a brilliant, though **dissolute** actor. The President was immediately removed from his box at the theater to a house across the street, where the whole nation anxiously awaited the verdict of the surgeons who had been summoned

to his bedside. The verdict fell like a blow upon the country—the wound was pronounced fatal! On the following day the President passed away, surrounded by members of his family, his Cabinet, and many other anxious watchers. As the great Emancipator breathed his last the big-hearted secretary of war, Edwin M. Stanton, sobbed aloud, “Now he belongs to the ages . . . There lies the most perfect ruler of men the world has ever seen.” This eloquent tribute of the great secretary, spoken in tears at the bedside of his dead chief, is today the final verdict of mankind.

After Lincoln’s Death

The startling event came close upon the welcome news from Appomattox. National joy was thus suddenly changed to national sorrow. The whole nation mourned the loss of:

*The kindly-earnest, brave, foreseeing man
Sagacious, patient, dreading praise,
not blame.*

New birth of our new soil, the first American.¹

But the wretch who had committed the cowardly deed was not to escape punishment, for the nation

Wept with the passion of angry grief.²

Booth fled but was brought to bay in a barn near an old farmhouse in Maryland, where, on refusing to surrender, he was not taken alive.

1. From “Abraham Lincoln,” by James Russell Lowell (1819–1891)
2. Ibid

A **conspiracy** was soon unearthed in Washington. On the night of the President’s assassination an attempt was made upon the life of Secretary of State Seward, which was foiled by the vigorous action of Seward’s son, who, in a hand-to-hand encounter, ejected from his father’s sick chamber one Payne, a self-confessed member of this band of conspirators. Payne and three others of the conspirators were afterwards hanged, while a few more who were later found guilty on the charge of aiding the plot were imprisoned for life.



The Last Hours of Abraham Lincoln, Designed by John B. Bachelder and painted by Alonzo Chappel, this work of art depicts those who visited the dying president throughout the night and early morning of April 14–15, 1865. These people did not visit Lincoln at the same time: they could not have all fit in the small first-floor room of the Petersen House. Lincoln’s wife, Mary, is pictured in the center, lying across the President’s body. His son Robert stands in the foreground to the right of the bed. Vice President Andrew Johnson is seated at the far left.

Lesson Two

History Overview and Assignments Reconstruction and Johnson’s Administration

ONCE THE WAR was over, the reconstruction of the South and readmission of Southern states into the Union were the pressing issues of the day. The creation of the Freedman’s Bureau and the ratification of the Fourteenth Amendment were devised as solutions to help address these challenges.



BEP engraved portrait of Johnson as President

Key People, Places, and Events

- Memorial Day
- Andrew Johnson
- Reconstruction
- Thirteenth Amendment
- Freedmen’s Bureau
- Radical Reconstruction

Reading and Suggested Assignments

- Review the discussion questions and vocabulary, then read the article: *Reconstruction and Johnson's Administration*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary word in the context of the reading. Write the word and its definition in the vocabulary section of your history notebook.
- Continue adding to your list of generals involved in the war, creating a bullet point list under each one that includes the battles they were involved in and the results of those battles. *This will be due at the end of this unit.*
- Do some outside research on how the **Fourteenth Amendment** has expanded the power of America's federal government over the century and a half since its enactment. Be prepared to share your findings with your class.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Vocabulary

vagrant

Discussion Questions

1. What was the cost in human life of the Civil War?
2. How did the national government finance the expenses of the war?
3. Describe three areas of improvement that came as a result of the Civil War.
4. What was the Grand Army of the Republic?
5. How did the celebration of Memorial Day start?
6. How did Andrew Johnson become president?
7. What was the purpose and intent of the Thirteenth Amendment?
8. The Thirteenth Amendment left some questions and challenges unanswered. What were they?
9. What was Lincoln's policy regarding Reconstruction?
10. What was Johnson's policy on Reconstruction?
11. Describe the laws several Southern states passed that virtually reinstated slavery.
12. List three provisions of the Fourteenth Amendment.

Adapted for High School from the book:

History of the United States

by William M. Davidson

Reconstruction and Johnson's Administration

The Cost of War in Men and Treasure

During America's Civil War more than 2,200,000 men enlisted on the Union side and half that number on the Confederate side. Nearly 110,000 Union soldiers and sailors were killed or died from wounds received in battle. The total number of deaths from all causes amounted to more than 360,000 on the Union side; to about 300,000 on the Confederate. It will thus be seen that on both sides a total of 3,700,000 men were under arms on the continent within a period of four years—from April 1861 to April 1865. Within the same four years 660,000 men laid down their lives in the camp or in the field of battle.

The total cost of the war to the national government was \$3,250,000,000. The cost of the war to the seceded states was at least \$1,750,000,000, making a total war expenditure in

the four years of five billion dollars. In the last years of the war, the total amount appropriated by Congress for the maintenance and support of the Union army was \$516,214,131, an average of nearly one and one-half million dollars per day.

The Finances of the War

To raise the vast amount of money necessary to carry on the war, the national government resorted to two methods—taxation and loans. The war tariffs, sometimes called the Morrill Tariffs, were first laid in 1861. Each succeeding session of Congress, from 1862 to 1865, passed some amendments to the original bill. Congress also levied internal taxes—upon incomes and salaries, trades and callings, nearly all home manufacturers, and the gross receipts of railroad, steamboat, and express companies. A stamp tax was also laid upon all legal

and public documents. This system of direct and indirect taxes produced an annual revenue of about \$300,000,000.

This amount not being sufficient to meet the enormous expenses of the government, the secretary of the treasury now began to borrow money on the credit of the United States. For these loans government bonds were issued bearing interest at various rates and payable at the option of the government after a certain number of years. Treasury notes, too, were issued to the amount of nearly half a billion dollars. This paper money became known as the “greenback currency.” To aid the government in carrying on its financial operations, Congress established and perfected the national banking system.

Improvements in Arms

The war called forth the inventive genius of the North. The improvements in firearms, heavy cannon, explosives, torpedoes, and all that goes into making war terrible and frightful marked an epoch in the manufacture of the implements and munitions of war. The success of the *Monitor* revolutionized the construction of the navies of the world. The practical application of the telegraph on the field of battle was demonstrated. The methods of feeding, clothing, and transporting large armies excited the admiration of the military experts sent from Europe to witness the progress of war.

The Sanitary and Christian Commissions

The suffering and hardships of army life were lessened through the efforts of the loyal women of the North. Nurses were sent into every hospital and army camp to look after the sick and care for the wounded. The Sanitary Commission and the Christian Commission did a work unequalled by any similar body in the history of war. Nearly twenty million dollars were raised and expended, without waste, by these splendid organizations which sent vast quantities of needed supplies to the army. Through their help thousands of soldiers were better fed and more warmly clothed. Delicate food was provided for the sick and ailing, and greater comforts placed in the army hospitals. Through the Christian Commission thousands of Bibles and large quantities of high-quality literature were distributed among the soldiers. The commission in every way aided in securing and maintaining a high moral standard among the men who composed the armies of the Republic. Nor was the work of these two

commissions devoted solely to the armies in the field. The widows and the orphans were tenderly cared for and comforted as well.

Growth: New States

While the South was devastated by the ravages of war, the progress of the northern states was steadily maintained. Two new states were admitted to the Union—West Virginia coming in in 1863 as the thirty-sixth state, and Nevada in 1864 as the thirty-seventh. It will thus be seen that the country grew in spite of the war. Lincoln recognized this on the very night of his second election, when the returns showed that the voting strength of the country in 1864 was greater than it that of 1860. During the decade in which the war occurred, the population of the country increased over seven million, and the total wealth of the country leaped from sixteen billion to more than thirty billion dollars. Manufacturers had thrived, internal commerce had prospered, and the great West had steadily grown. War and national growth were carried on side by side. While granting appropriations to meet the expenses of the war, Congress at the same time passed a liberal homestead act and made large grants of land to the Union Pacific railroad—which line was soon to join the Atlantic to the Pacific and make it possible for one to ride from ocean to ocean across the continent.

The Grand Review at Washington

When Lee surrendered on April 9, 1865, there were more than a million Union soldiers under arms on the continent. Many Europeans predicted that the government could not peaceably disband such a large force of men. They warned that when the soldiers were once released from the restraint of army discipline, riot and bloodshed would follow in every section of the Union. The people of the European countries, with their large standing armies, could not appreciate the difference between a standing army maintained by force of government and a volunteer citizen soldiery maintained by patriotism. Europe’s fears were altogether groundless. By November 1, 1865, fully 800,000 men had been mustered out of service, “without a fancy in any mind that there was anything else to do.” However, “before the great army melted away into the greater body of citizens, the soldiers enjoyed one final triumph—a march through the capital undisturbed by death or danger, under the eyes of the highest commanders, military and civilian, and

the representatives of the people whose nationality they had saved.”

For two whole days (May 23 and 24) the army of the Potomac, “which for four years had been the living bulwark of the national capital,” and the army of the West, which had twice cut the Confederacy in two, marched in grand review along the full length of Pennsylvania Avenue—the principal street of the national capital. On a platform in front of the White House stood **Andrew Johnson**, made president by the assassination of Lincoln, and a great number of men prominent in army and public life, as well as many foreign representatives from the diplomatic corps. No mightier martial host was ever gathered together on the continent. These men in a few short months were to be engaged in peaceful walks of life—to take up life’s struggle where they had left it off four years before. The memories of the war, however, were not to be forgotten but to be kept alive in the “camps of peace” of the Grand Army of the Republic, organized the very first year following the close of the war.

The Grand Army of the Republic

The motto of the Grand Army of the Republic was “Friendship, Charity, and Loyalty,” and all that these words imply, toward the comrades in arms and their country which they saved. The first post of the Grand Army of the Republic was organized at Decatur, Illinois, by Major B. F. Stephenson, of the 14th Illinois infantry, April 6, 1866. The first national convention met in Indianapolis, November 20, 1866, and perfected the national organization, afterward known as the National Encampment Grand Army of the Republic. All honorably discharged Union sailors and soldiers of good moral character of the war were eligible to membership. The second meeting of the National Encampment took place at Philadelphia in January 1868, where General John A. Logan was elected commander in chief. He ordered May 30 to be observed as **Memorial Day** for the purpose of strewing with flowers the graves of comrades who died in defense of their country. Memorial Day, which is sometimes erroneously called “Decoration Day,” is now a legal holiday. The Grand Army of the Republic was dissolved in 1956, when its last member died.

Associated Organizations

The First Organization of Women for active cooperation with the Grand Army of the Republic

met at Portland, Maine in 1869. Various societies of women with patriotic objectives established a state organization at Fitchburg, Massachusetts in 1879, under the title Women’s Relief Corps. All loyal women of good moral character were eligible for membership.

The Ladies of the Grand Army of the Republic, organized in 1881, was composed only of women who were the wives, sisters, mothers or daughters of honorably discharged Union soldiers, sailors, or marines who served in the war.

Each of these groups had a local, state, and national organization. Their object was to assist the Grand Army of the Republic in its high and holy missions and to encourage and sympathize with them in their noble work of charity; to extent needful aid to members in sickness and distress; to aid sick soldiers, sailors, and marines; and to do all in their power to alleviate suffering.

Other associated organizations of the Grand Army of the Republic, but not subordinate to it, included the Sons of Veterans, the Union Veteran Legion, Union Veteran’s Union, Union Ex-prisoners of War Association, the Loyal Legion, and the Veteran’s Rights Union.

Andrew Johnson

Andrew Johnson, the seventeenth President of the United States, was born in poverty in Raleigh, North Carolina on December 29, 1808. He was orphaned at four years of age; at ten he was apprenticed to a tailor. Being an ambitious boy, he learned to read with the help of one of the workmen. Writing, however, he did not yet aspire to, and it was not until after his marriage that he learned the art, his wife being his teacher. At sixteen he set up as a tailor on his own account. Settling in east Tennessee, he became the leader of the Tennessee Democrats, who opposed the rule of the slaveholding aristocracy of the state. In 1835 he was elected to the state legislature; in 1841 he became state senator; and in 1843 a congressman, holding that office for ten years. He then became governor of Tennessee, serving two terms. In 1857 he was elected United States senator and proved himself a bold and active enemy of slavery. In 1862 President Lincoln made him military governor of Tennessee; in 1864 the Republicans nominated him for vice president, though he was still a Democrat, and in 1865 he became president.

Andrew Johnson's Administration, Republican: 1865-1869

Johnson was a man of lofty principles and pure morals and had a strong and keen intellect. He was, however, obstinate, quick-tempered, and lacking in the essential element of tact. His character accounts for the difficulties he met while president.

After having been president he continued actively in politics, and though he was several times defeated for office, he became United States senator once again in 1875. Johnson died near Carter's Station, Tennessee on July 29, 1875.

Problems

A prolonged war always leaves a country in a disorganized condition, especially in regard to its finances and its business life and tends to breed corruption in public affairs. The Civil War had not only these effects, but one other result far different from these. It left the southern states ruined and conquered, without governments and without the materials from which to erect government.

It was impossible to turn the states over to those who had just been fighting against the Union. If the fruits of the war were not to be lost, it was felt that the national government must take charge of these states for a time. But that, said many, was contrary to the fundamental idea of the Union, that the states must manage their own affairs. In this difficulty, many people declared that the southern states no longer existed as states, but simply as territories of the United States; others asserted that they were still states, but without the rights and functions of states, and that the central government could impose conditions at their restoration. This last was the theory generally adopted. The process of restoring the seceded states to their old position was called **Reconstruction**.

Then came other questions: On what terms should they come back? Should these terms be easy or harsh? Who had the right to dictate what they should be, the President or Congress? Finally and most difficult and most important of all, what situation was the former slave to occupy?

The Thirteenth Amendment

One point in this regard had been quickly settled. An amendment to the Constitution had been proposed by Congress in February 1865, abolishing slavery forever. So the African-American was not to be a slave. But was he to have full privileges and powers of citizenry? Was he to vote? Was he to hold

office? Or was he to be kept in a condition of inferiority, though free?

Beginning of Reconstruction

President Lincoln had early taken up the problem of Reconstruction. He believed that the President could restore the states to the Union without the interference of Congress and acted on that supposition. In December 1863, he issued a proclamation granting pardon and restoring property ownership to those who gave up secession and swore to defend the Constitution and all the laws and proclamations emancipating the slaves. Only the most prominent leaders were refused these conditions. Lincoln then said that when one-tenth of the qualified citizens who had voted in 1860 should take the oath and set up state governments, the President would recognize these as the lawful governments of the states. Thus Reconstruction would be achieved, and by the President alone.

Under this plan Arkansas was reconstructed in 1863; and Louisiana and Tennessee in 1864. Congress, however, did not agree with the President that he had the power to reconstruct states. On the contrary, it claimed that power for itself. It therefore opposed his plan and refused to admit senators and representatives from the newly-constituted states.

Johnson's Policy

Naturally Johnson adopted Lincoln's plans, and since Congress was not in session when he became president and would not be for eight months, he could do as he pleased for that period of time. He therefore issued a proclamation of pardon in May 1865, very much like that issued by President Lincoln. The reconstructed states, however, must ratify the **Thirteenth Amendment** abolishing slavery. The conditions being accepted by the southern states, excepting only Texas, he proceeded, in accordance with Lincoln's ideas, to reconstruct seven more states, Texas being the only one now left out. The acceptance of the Thirteenth Amendment by these states made it part of the Constitution, and it was declared in force December 18, 1865.

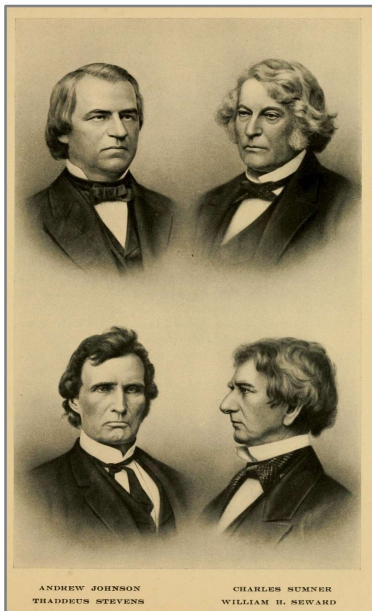
Legislations Against the Freedmen

Several of the southern states passed laws virtually restoring slavery. Thus, in Virginia, all persons who would not work the wages commonly paid were declared **vagrants** and could be forced to work; in Mississippi African American orphans and minors without means of support were to be hired

out to masters until they became of age. This was slavery for that length of time. That there might be no mistaking the intention of the legislature, the master was given the right to whip the servant. African American persons without employment were declared vagrants and were to be arrested and fined. If unable to pay the fine, as they undoubtedly would be, they were to be hired out for a term of service. They were forbidden to carry arms or to preach the gospel without a license, and if they did so were fined. In South Carolina a similar code of laws was enacted, but additions were made to it—no freedman could have a trade or occupation other than agriculture or contract service without paying a special license of from \$10 to \$100.

The Congressional Theory

Congress met in December 1866. Most of the Republican members were strongly opposed to the President's Reconstruction ideas. They were displeased, too, at the acts of the new southern legislatures. Were the southern states to be permitted to accept the Thirteenth Amendment, and then in mockery trample it under foot by making laws utterly nullifying its provisions? Assuredly not, replied the Republicans, who refused to recognize Johnson's work and would not allow the senators and representatives from the southern states to take their seats.



Reconstruction Leaders

Radical Reconstruction

Led by Representative Thaddeus Stevens of Pennsylvania and Senator Charles Sumner of

Massachusetts the Radical Republicans, who had earlier criticized Lincoln for his moderate stance and now sought the establishment civil rights for former slaves, began to prepare a Reconstruction plan of their own. They made good their right to do so by declaring that the states out of the Union were in the condition of territories, and so could be readmitted only by Congressional action. Hence the President on his own authority had no power whatever to restore those states. Acting on this theory, the Radical Republicans declared that the southern states should not be considered included in the Union until Congress assented.

The Freedmen's Bureau

The Radicals then proceeded to thwart the nullifying laws passed by the southerners. The federal troops which were still in the South were ordered to stay there and protect the former slaves in their new-found liberty. This was effective. Congress then, in February 1866, passed a bill continuing the **Freedmen's Bureau**, which had been created in 1865 to take care of sick and helpless freedmen and to render assistance of all kinds to the African-American people. The President vetoed the bill. In July Congress passed it again, and when the President vetoed it, they passed it over his veto. This was a fatal blow to the President's Reconstruction plans, for it proved that his opponents had possession of two-thirds of both houses and could always pass bills over his veto.

The Fourteenth Amendment

Congress then cleared the way for its plan of Reconstruction by passing a Civil Rights Bill, which gave the freedmen the same rights to "life, liberty, and the pursuit of happiness" which full citizens possessed but did not include political rights such as the privilege of voting or holding office. The President vetoed the bill, declaring it unconstitutional. Congress immediately passed it over the veto. To avoid the objection of unconstitutionality, however, and to make certain that it should never be repealed, the Republicans resolved to force the Civil Rights Bill into the Constitution. Consequently a fourteenth amendment was proposed.

This enacted that "all persons born or naturalized in the United States" were citizens of the United States and of the state in which they lived. No state was to diminish in any way the civil rights of any citizen. The federal courts were to be open to all

citizens. Thus the former slave would be a citizen of the United States and could appeal to the national courts against such laws as those passed by the reconstructed states.

The amendment did not compel the states to grant the privilege of voting. That the state could grant or refuse, but if refused, the representation of the state in Congress was to be reduced in proportion to the number of those who could not vote.

The third section of the amendment made it impossible for those Confederate officers who had

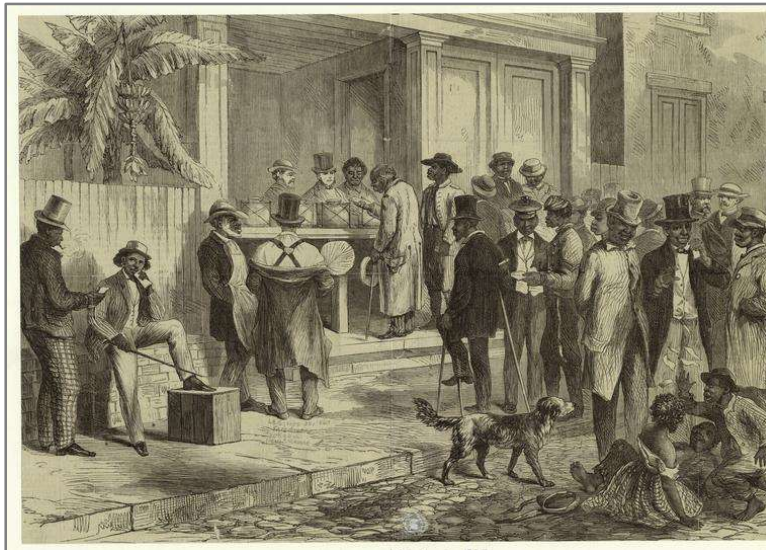
been in the service of the United States or of a state before the war to vote or to hold office. This restricted the President's pardoning power and would also throw government in the southern states into the hands of Union men and freedmen.

The fourth section guaranteed the debt of the United States, and at the same time made all debts of the Confederacy null and void. These provisions were the same as those which had been put in the Civil Right Bill. The **Fourteenth Amendment** was declared in force on July 28, 1868.

Lesson Three

History Overview and Assignments Reconstruction Begins

THE ISSUE OF Reconstruction in the South was a topic of debate through Johnson's term in office. It was Congress that eventually limited the power of the President in this area and enacted laws that affected the readmission of the Southern states into the Union and guidelines by which that readmission would occur.



Freedmen Voting in New Orleans (1867) engraving showing African Americans who had been enslaved only a couple years later participating in an election

Reading and Suggested Assignments

- Review the discussion questions and vocabulary, then read the article: *Reconstruction*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Complete your list of generals involved in the war, creating a bullet point list under each one that includes the battles they were involved in and the results of those battles.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Vocabulary

scalawag
carpetbagger

Key People, Places, and Events

Andrew Johnson
Tenure of Office Act

Napoleon III
Maximilian I

Purchase of Alaska

Discussion Questions

1. What was the main issue of the congressional campaigns of 1866?
2. How did Congress limit Johnson's powers?
3. What was required of the Southern states for them to be readmitted to the Union?
4. What four states refused that requirement and remained under military rule?
5. Why was President Johnson impeached?
6. What did Napoleon III seek to do in Texas and Mexico? What happened in result?
7. How much did the US pay for Alaska?

Adapted for High School from the book:

History of the United States

by William M. Davidson

Reconstruction

The Congressional Election of 1866

The election of representatives to Congress in 1866 was expected to reveal the will of the northern people with regard to the Fourteenth Amendment and of the struggle between president and Congress. If the people sided with President **Andrew Johnson**, they would elect representatives favorable to his plan; if not, they would elect representatives favorable to the Congressional plan. The campaign was heated, and the President made most undignified and violent speeches against his opponents, abusing Congress, asserting that certain Congressmen were trying to destroy the Constitution, and more than hinting that the same individuals wished to have him assassinated. Such foolish and venomous talk made him contemptible and helped materially to ruin the cause which he championed. As a consequence, the new Congress was to be more bitterly opposed to the President than the old one.

Congress Limits Johnson's Powers

While the elections were taking place, all the southern states, excepting only Tennessee, had contemptuously rejected the Fourteenth Amendment, which could not become part of the Constitution without their assent. Congress at once admitted Tennessee into the Union and decreed that the other ten seceded states could not come back until they had ratified the amendment. The Republicans then carried out a program which put them in complete control. In the first place, the Congress just elected was authorized to meet on March 4, 1867, instead of December. This would give

the President no chance whatever to carry out measures which Congress opposed. The Republicans next passed the **Tenure of Office Act**, by which the President was forbidden to dismiss any government official without the consent of the Senate; they then enacted a third measure which made General Grant supreme as head over the army, so that the President's control over the troops could be taken away.

The Completed Reconstruction Measures

The Congress elected in 1866 met on March 4, 1867, and at once completed the Reconstruction measures. The ten southern states still outside of the Union were divided into five military districts, over each of which a general was placed to carry out by military force the policy of Congress. The measures of Reconstruction were then detailed. The state governments recognized by the President were set aside; all citizens of the southern states who were not excluded by the Fourteenth Amendment were to elect delegates to state conventions. The conventions would draw up new constitutions. These constitutions, however, must allow for freedmen to vote. The constitution was next to be ratified by the same voters who had elected the delegates to the convention. The state would then be ready to enter the Union, but before it came in, it must adopt the Fourteenth Amendment. Until that was done the military officers would remain in control.

Reconstruction Carried Out

This plan put the power of the southern states into the hands of southern Union men and the

freedmen. The result was that the conventions in Arkansas, North Carolina, South Carolina, Alabama, Louisiana, and Florida accepted the conditions of Congress, approved the Fourteenth Amendment, and were recognized as being states with full state powers. The work was completed in June 1868. Virginia, Mississippi, and Texas refused to accept the Fourteenth Amendment; Georgia, after accepting it, passed laws against former slaves, and was refused admission. These four states, therefore, remained subject to military rule.

Military Rule in the South

The military government set up by Congress had absolute power in the southern states until Reconstruction was complete. The generals in command made regulations, dismissed and appointed civil officers at will, set aside the laws and institutions of the various states, and put military courts in the place of the civil courts. The former slaves were protected in their rights and encouraged to vote and hold office.

The New Governments

Where Reconstruction was completed, the new governments usually fell into the hands of the most incapable and least competent classes of the population. Not infrequently white men without property or character and without experience in political life, contemptuously called “**scalawags**,” controlled the votes of former slaves, enabling them to secure the offices and plunder the country. They were joined by a number of northern men of much more ability and political experience, but most of whom came to the south to make fortunes. These people were called “**carpetbaggers**,” because in many cases they brought all their worldly possessions with them in a satchel made from carpet. Some of them were honest and desired to help the South, but many were neither honest nor helpful. Legislatures made up of three classes voted vast sums of money to themselves and their friends. In South Carolina a mixed legislature furnished the statehouse in magnificent style: clocks cost \$480 each; mirrors, \$750, and each member was voted a china cuspidor (spittoon) worth \$8. At the end of each session all this magnificent furniture mysteriously disappeared, and the legislative halls had to be refurnished at equal expense. Many of the legislators, and many of the judges, could neither read nor write. Some of these legislatures often voted money lavishly—even recklessly. Within four and a

half years the debt of Louisiana was increased by \$106,000,000. Taxes became so oppressive that many impoverished southern planters could not pay them and had to part with their old plantations.

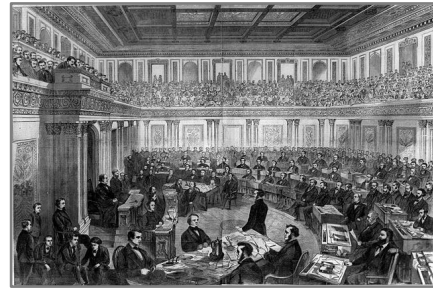


Illustration of Johnson's impeachment trial in the United States Senate, by Theodore R. Davis, published in Harper's Weekly

The Impeachment of President Johnson

President Johnson, left in an office without power, and, on account of the Tenure of Office Act, denied the power to oust officials who were obnoxious to him, struggled angrily and vainly against the will of the majority in Congress. Finally, he resolved to dismiss Secretary Stanton, in spite of the Tenure Act, which forbade his dismissing any official without the consent of the Senate. Hereupon Stanton appealed to the House of Representatives, which, on February 24, 1868, determined to impeach the President. The impeachment was brought before the Senate, with the chief justice, for this purpose, the presiding officer. On May 16 a vote was reached on the article charging Johnson with having broken the Tenure of Office Act. It was then found that two-thirds of the Senate would not declare the President guilty, the vote being 35 for conviction to 19 against. Hereupon the impeachment failed. This trial produced the greatest excitement both in Congress and throughout the country and provoked much bitterness of party spirit.

The State of Nebraska

On March 1, 1867, Nebraska was admitted as the thirty-seventh state. The Constitution of the new state not only granted freedom to all men, but the vote to former slaves.



The official symbol and slogan for the State of Nebraska

French Intrigues in Mexico Blocked

After the war for the Union, the Department of State had many an occasion to present the rights of America among the powers of the world. Only a little while after the civil conflict came to a close, it was called upon to deal with a dangerous situation created in Mexico by the ambitions of **Napoleon III**. During the administration of Buchanan, Mexico had fallen into disorder through the strife of opposing political parties; the President asked for authority to use American troops to bring to a peaceful haven “a wreck upon the ocean, drifting about as she is impelled by different factions.” But America’s own domestic crisis then intervened.

Observing the United States heavily involved in its own problems, the great powers—England, France, and Spain—decided in the autumn of 1861 to take a hand themselves in restoring order in Mexico. They entered into an agreement to enforce the claims of their citizens against Mexico and to protect their subjects residing in that republic. They invited the United States to join them, and, on meeting a polite refusal, they prepared for a combined military and naval demonstration on their own account. In the midst of this action, England and Spain, discovering the sinister purposes of Napoleon, withdrew their troops and left the field to him.

The French emperor, it was well known, looked with jealousy upon the growth of the United States and dreamed of establishing in the western hemisphere an imperial power to offset the American Republic. Intervention to collect debts was only a cloak for his deeper designs. Throwing off that guise in due time, he made the Archduke **Maximilian I**, a brother of the ruler of Austria, emperor in Mexico, and surrounded his throne by French soldiers, in spite of all protests.

This insolent attack upon the Mexican

Republic, deeply resented in the United States, was allowed to drift in its course until 1865. At that juncture General Sheridan was dispatched to the Mexican border with a large armed force; General Grant urged the use of the American army to expel the French from the continent. The secretary of state, William H. Seward, counseled negotiation first, and, applying the Monroe Doctrine, was able to prevail upon Napoleon III to withdraw his troops. Without the support of French arms, the sham empire in Mexico collapsed like a house of cards and the unhappy Maximilian, the victim of French ambition and intrigue, met his death at the hands of a Mexican firing squad.

Alaska Purchased

The Mexican affair had not been brought to a close before the Department of State was busy with negotiations which resulted in the purchase of Alaska from Russia. The treaty of cession, signed on March 30, 1867, added to the United States a domain of nearly six hundred thousand square miles, a territory larger than Texas and nearly three-fourths the size of the Louisiana Purchase.

Though it was a distant colony separated from America’s continental domain by a thousand miles of water, no question of “imperialism” or “colonization foreign to American doctrines” seems to have been raised at the time. The treaty was ratified promptly by the Senate. The purchase price, \$7,200,000, was voted by the House of Representatives after the display of some resentment against a system that compelled it to appropriate money to fulfill an obligation which it had no part in making. Seward, who formulated the treaty, rejoiced, as he afterwards said, that he had kept Alaska out of the hands of England.

—Adapted from *America, A World Power*,
by Charles A. Beard and Mary R. Beard



Alaska’s size compared with the 48 conterminous (border-sharing) states

The Artios Home Companion Series

Unit 6: Reconstruction and Postwar Advancements

Teacher Overview

AFTER RECONSTRUCTION, one might argue that a new American nation was created as new policies were adopted. With the North and the South joined together once more, Americans turned with breathtaking energy to meet new challenges. The emphasis of this new movement was on expansion—in population, commerce, and territory. This movement and its accompanying issues and inevitable conflicts were dealt with during the administrations of Presidents Grant, Hayes, Garfield, Arthur, and Cleveland. At the same time, a new wave of imperialism began sweeping through Africa and Asia as Western powers, hungry for natural resources and control of new territory, started competing with fresh vigor over these lands and populations.



The Fifteenth Amendment to the Constitution of the United States was proposed to the legislatures of the states by the Fortieth Congress on the 26th of February 1869, and was declared, in a proclamation of the Secretary of State dated March 30, 1870, ratified by the legislatures of 29 of the 37 states.

Suggested Assignments

In this unit, students will:

- Complete four lessons in which they will learn about the **administrations of Presidents Grant, Hayes, Garfield, Arthur, and Cleveland**, as well as **New Imperialism** and **advances in technology and science**, journaling as they read.
- Define vocabulary words.
- Conduct research on **one topic of their choice** from the lists of key people and events in this unit and be prepared to share what they learned with their class.
- Complete a biography notebook page on the presidency and later life of **Ulysses S. Grant**.
- Instead of using discussion questions, this unit and the next will focus on note-taking skills in an outline format. Directions are given in each lesson, using the instructions on the website in their the **ArtiosHCS** curriculum.
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

Honesty is a character quality to be desired.

The integrity of the upright guides them, but the crookedness of the treacherous destroys them.

– Proverbs 11:3

God hates ungodliness and slavery.

Now we know that the law is good, if one uses it lawfully, understanding this, that the law is not laid down for the just but for the lawless and disobedient, for the ungodly and sinners . . . enslavers, liars, perjurers, and whatever else is contrary to sound doctrine.

– 1 Timothy 1: 8-10

God created all human beings equal in His sight. Although we may have different and individual God-ordained purposes, God sees us as equal.

There is neither Jew nor Greek, there is neither slave nor free, there is no male and female, for you are all one in Christ Jesus.

– Galatians 3:28

Each person is called by God to do work, in order to contribute to the community in which he lives.

For even when we were with you, we would give you this command: If anyone is not willing to work, let him not eat.

– 2 Thessalonians 3:10

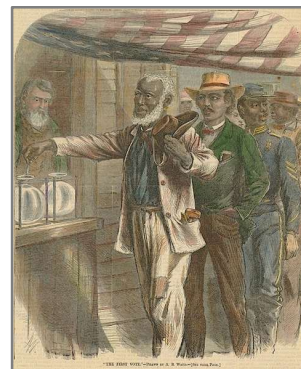
Lesson One

History Overview and Assignments President Grant's Administration

AFTER THE DEVASTATION of the Civil War, America elected her victorious general to be their president. But while Ulysses S. Grant was an excellent military strategist, he turned out to be an ineffective president. First, he lacked the necessary political experience to perform the job well. Second, he preferred to allow Congress to direct the Reconstruction process and largely run the nation. And third, while Grant was an honest man, his administration became marked by corruption and scandal.



Ulysses Simpson Grant,
official presidential portrait, by Henry Ulke (1875)



African Americans vote for the first time, as depicted
in 1867 on the cover of *Harper's* magazine.
Engraving by Alfred R. Waud

Suggested Reading and Assignments

- Read the article: *President Grant's Administration*.
- Complete a biography notebook page on the presidency and later life of **Ulysses S. Grant**.
- For each heading listed in today's article, create a bullet point outline showing the main points made by the author. (A bullet point outline can be described as an informal outline using indentions or dashes behind which are listed the main points about a specific topic.) Use the website found on your **ArtiosHCS** curriculum website to explore the use of outlines.
- Conduct research on **one topic of your choice** from the lists of key people and events in this unit. Be prepared to share what you learned with your class.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

Ulysses S. Grant
Pacific Railroad
Fifteenth Amendment
Ku-Klux Klan
Enforcement Act of 1870
Enforcement Act of 1871
Jim Crow Laws
Treaty of Washington
Geneva Award

Great Chicago Fire of 1871
Ten Years' War
Virginus Affair
Horace Greeley
US Civil Service Commission
Coinage Act of 1873
Demonetization of Silver
Inflation Bill of 1874
Financial Panic of 1873

Battle of Little Bighorn
Great Sioux War of 1876
Amnesty Bill of 1872
Crédit Mobilier Scandal
Whiskey Ring
Tammany Hall
Rutherford B. Hayes
Greenback Party
Electoral Commission

Adapted for High School from the book:

History of the United States

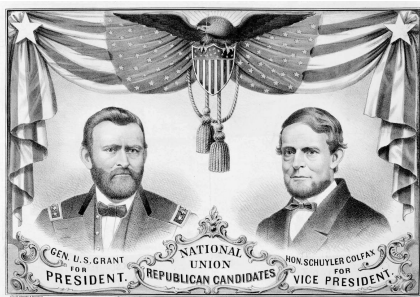
by William M. Davidson

President Grant's Administration

Republican: 1869 – 1877

Election of 1868

The Republicans were now through with Johnson for good or ill. In 1868 they nominated General **Ulysses S. Grant** for president. Horatio Seymour of New York was the Democratic candidate. Grant was easily elected, receiving 214 votes to Seymour's 80.



1868 Republican poster of Grant and Colfax

Ulysses S. Grant's Administration, Republican: 1869-1877

Ulysses Simpson Grant, eighteenth President of the United States, was born at Point Pleasant, Ohio, April 27, 1822, the son of an Ohio farmer. In 1839 he was appointed a West Point cadet. On his graduation he was made a second lieutenant and was soon engaged in the Mexican War. In 1854, after attaining the rank of captain, he retired and went into business in St. Louis until August 1860, when he removed to Galena, Illinois and worked as clerk in his father's store.

At the beginning of the war, he was appointed colonel of volunteers and rose rapidly until he was made lieutenant general with command of all the armies in the field in March of 1864. In 1868 he was elected US President, and again in 1872.

After his retirement Grant made a voyage around the world, which added to his fame both abroad and at home. In 1880 he was a candidate for a third term but failed to receive the Republican nomination. The latter years of his life were employed in the writing of his *Personal Memoirs*, a work creditable to his reputation as a soldier and as an author.

Grant died on July 23, 1885, at Mount McGregor, New York.

First Transcontinental Railroad

It had long been the opinion of the people of the United States that a railroad should be built to the Pacific coast so that the country might be bound firmly together. As it was impossible for any corporation to build this railroad without financial assistance, the government loaned large sums of money and gave liberal grants of western land to the Central Pacific and the Union Pacific companies for the building of the **Pacific Railroad**. With the help of these grants, which the companies sold at a large profit, and by hiring Irish and Chinese laborers for low wages, North America's first transcontinental railroad, which connected the eastern US rail network in Nebraska with a wharf on San Francisco Bay, was finished in 1869. Great was the rejoicing over the completion of this gigantic task.

The Fifteenth Amendment

Just before Grant's inauguration in 1869, Congress proposed another amendment to the Constitution which declared that the right to vote should "not be denied or abridged by the United States or any state on account of race, color, or

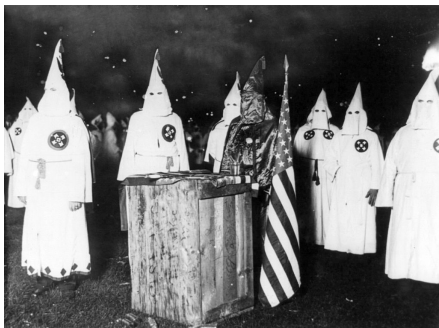
previous condition of servitude.” By the addition of this amendment, it was expected that the right of the freedman to vote could never be taken away. The ratification of the amendment was then made a condition of the Reconstruction of the four Southern states which were still out of the Union: Virginia, Georgia, Mississippi, and Texas. The **Fifteenth Amendment** was declared in force March 30, 1870.

“Carpetbaggers” and “Scalawags”

The first result of the Congressional plan of Reconstruction was to give the control of the Southern states to formerly enslaved men and their white allies. Some of these white friends of the freedmen were men of character and ability, but most were adventurers who came from the North to make their fortunes. They became known as “carpetbaggers,” because many of them carried cheap luggage made from carpet.

The few Southern whites who befriended the African Americans were called “scalawags” by their white neighbors. Secret societies sprang into being to oppose them.

– Adapted from A Short History of the United States, by Edward Channing



KKK rally in Chicago, c.1920

The Ku-Klux-Klan

Many white people of the South, dissatisfied with the disturbed condition of Southern politics under Reconstruction, sought to defeat the party in power by the organization in 1866 of a secret society known as the **Ku-Klux Klan**. Its members were bound by oath to obey the orders of their superiors, and an organized attempt was made to prevent formerly enslaved people from voting. African Americans were terrified by the appearance at night of ghostly figures masked and robed in white, who went groaning and howling about their cabins. Those who could not be intimidated by this despicable mummery were dragged out of their huts, flogged severely, and sometimes killed. Later the Klan harassed white men who assisted freedmen in the same way. Notices to leave the country were sent to

such men, with a threat of death if the notice was not obeyed. Many murders resulted; by 1870 the society had established a reign of terror over a great part of the South, with the result that many African American voters refrained from going to the polls.

Enforcement Acts

The Klan became extremely violent in 1870 and 1871. In May 1870, without knowing who committed the outrages, Congress passed the **Enforcement Act of 1870** to carry out the Fourteenth and Fifteenth amendments. By this law the United States courts were to try all cases of intimidation and bribery of voters, frauds at the ballot box, and all interference with elections or election officers. This was not sufficient, and in the following year the **Enforcement Act of 1871** was passed.

Congress had now learned about the Ku-Klux, and this act was aimed against the dreaded society. Severe punishments were to be inflicted upon those who committed the outrages, and the President was allowed to use the Army and Navy to carry out the law. The authorities acted with decisive energy. Many men were arrested, tried, and sentenced to prison. Under this treatment the Klan quickly disappeared from open view.

Jim Crow Laws

The members of the secret societies, along with other *white supremacists*, didn't easily give up their fight, however. By means of terrorist groups, called by such names as the *White Man's League* and the *Red Shirts*, these resentful white Southerners ran Republican officeholders out of town, thwarted Republican efforts to support formerly enslaved people economically and politically, and intimidated people of African descent to try to keep them from voting.

Southern Democrats gradually regained domination of the Southern legislatures and started enacting laws to enforce racial segregation in public facilities, schools, and transportation. *These laws were called Jim Crow Laws, the name being derived from a song-and-dance minstrel routine ridiculing African Americans that was performed early in the nineteenth century. Many of these abhorrent laws remained in force until 1965.*

Reconstruction Completed

The year 1871 saw the end of unreconstructed states. Virginia was admitted in January, Mississippi in February, Texas in March 1870; and Georgia in January 1871. This completed the work of Reconstruction by Congress.

The Southern states, however, were not yet left to work out their own problems. Under the Enforcement Acts the President had the power to keep troops in the South and to interfere in public affairs. As it was believed with only too much reason that the freedmen would not be fairly treated, the “rule of the bayonet” was still employed. The result was constant turbulence, riots, and at times something like civil war in those states.

Sharecropping

Southern landowners, seeking to revive the South’s devastated economy, developed a system of sharecropping as a solution. Unable to pay workers in cash since so little was available, and unable to keep low-wage workers through the harvesting season, the owners began leasing out their land to laborers—some but not all of whom were freedmen—in return for a portion of crops. Under varied arrangements, some workers provided their own tools while others rented them.

Problems arose, partly because cash crops (grown for quick profit rather than subsistence) such as cotton and tobacco were preferred. These didn’t provide needed food for the workers, tended to deplete the soil, and brought in poor returns in post-war territory. Sharecroppers also had to buy groceries and other necessary items on credit. Interest being high, the laborers were quickly caught in a trap of endless debt. The system enabled basic survival, but workers were not able to thrive or purchase land.

The Treaty of Washington

President Grant’s first term was largely devoted to the settlement of foreign questions. The most important problems were those involving American relations with England. There were three: the fishery question, the water boundary on the northwest, and the *Alabama* question—the claim for damages by the United States for the injuries inflicted by Confederate war vessels built in England, the most significant of which was the *Alabama*.

America’s minister to England had tried to settle these points in 1869, but the treaty he made was so unsatisfactory that it was rejected with indignation, and not a few Americans began to talk excitedly of war with England. In 1870, however, the question was taken up peaceably, and in 1871 England and the United States signed the **Treaty of Washington**, by which the Americans received satisfaction in regard to fisheries, and the other questions were to be settled by arbitration.

The Emperor of Germany was selected to decide upon the boundary dispute. The question at issue concerned the line down the straits between Vancouver Island and the mainland. If this boundary line passed through “the channel” to the west of San Juan Island, it would leave that island to America; if it passed through the channel to the east, the island would go to Great Britain. In 1872 the German emperor gave his decision in favor of the United States.

The Alabama Claims: The Geneva Award

The *Alabama* dispute was harder to settle. The American government claimed that since Great Britain had allowed the *Alabama* and other Confederate privateers to be fitted out in her ports, she was responsible for the damages done by these privateers. Great Britain replied that no such rule of international law existed.

The matter was left to five arbitrators, one each from Great Britain, the United States, Italy, Brazil, and Switzerland. In 1872 the court of arbitration, sitting at Geneva, Switzerland, decided by a vote of four to one that Great Britain was responsible and should pay \$15,500,000 in gold to the United States.

The English were much displeased at the resulting **Geneva Award**. The verdict of the court was that a neutral nation must observe “due diligence” to prevent its territory from being made the base of armed expeditions against another power, and that the nation failing to employ such “due diligence” must pay damages.

The Great Chicago Fire of 1871

One Sunday in October of 1871 a fire started in or near a barn next to an alley in Chicago, Illinois. The traditional account of a cow kicking over a kerosene lamp in a barn has been widely disputed, so the cause is still unknown and may have been related to other fires that began that morning. In either case, a furious gale carried the burning sparks from one wooden building to another. The fire went on spreading all that night and the following day. Approximately 300 people were killed, and nearly \$200,000,000 worth of property was destroyed. The homes of nearly one hundred thousand persons were burned down. But, in a surprisingly short time the burnt district was rebuilt, building codes were improved to prevent rapid spread of future fires, and Chicago grew more rapidly than ever before.

*—Adapted from A Short History of the United States,
by Edward Channing*

Cuba: The *Virginius*—1873

In 1868 a rebellion against Spain had broken out on the island of Cuba, and much sympathy was expressed in the United States for the Cubans. This conflict escalated into Cuba's **Ten Years' War**, the first of three wars for independence Cuba fought against Spain.

President Grant insisted that Americans take no part in the contest, but many young men stole away to assist the Cubans, while arms and ammunition were privately sent from the United States. Naturally the Spaniards were enraged.

In October 1873, the captain of a Spanish man-of-war captured the *Virginius*, a privately-owned American merchant vessel, hauled down the American flag, and proceeded to execute by firing squad the captain and over fifty of the crew, nine of whom were American citizens. The excuse for all this was that the *Virginius* was perceived as a hostile American threat to Cuba.

This was probably true, but the seizing of an American vessel, along with the summary and brutal slaughter of American citizens, drove the country into a frenzy of rage. It required all the President's tact and firmness to avoid war. He straightaway demanded from Spain a humble apology and monetary damages. These the Spaniards gave, declaring that they had no intention of insulting the United States in seizing the *Virginius*.

Cuba's Struggle Seeking Independence

The Ten Years' War, which lasted from 1868-1878, was a rebellion against Spain led by wealthy Cuban-born planters and business owners, who proclaimed independence in October 1868 and commenced hostilities against the Spanish colonial government. The Spanish responded with brutal violence.

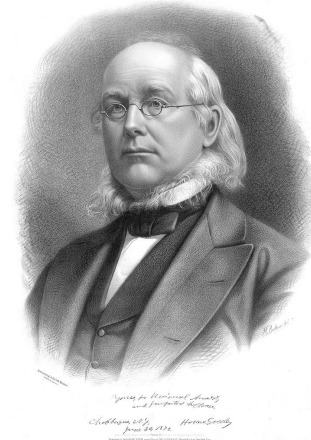
Spain's efforts to crush the rebellion were hindered by a civil war the country was experiencing, but when this conflict ended in 1876 the government sent more troops to Cuba.

*The Cuban rebels sued for peace in 1877, and after two years of negotiation a pact of peace was signed, by which certain reforms were enacted, including gradual abolition of slavery. Hostilities ceased until ongoing tensions erupted into the outbreak of the **Little War** in 1879.*

This uprising did not receive the support it needed from the exhausted population, and most of its leaders were arrested. By September of 1880 the rebellion was put down.

Spanish promises of reform were ineffective,

*and continued turmoil resulted in a third uprising, the **Cuban War of Independence**, in 1895. With help from the US, Cuba would finally gain independence from Spain in 1898. (There will be more info about this in Unit 9.)*



Horace Greeley

Artist's name at lower right reads "J.E. Baker del."
Mark at lower left reads "Armstrong & Co, lith, Boston / 57 Milk St. Boston." Handwriting at bottom, presumably facsimile, reads: "Yours, for Universal Amnesty and Impartial Suffrage / Chappaqua, N.Y., / June 30, 1872 / (signed) Horace Greeley"

The Campaign of 1872

During Grant's administration, much corruption in the management of public affairs had come to light. Although the President was thoroughly honest and was known to be opposed to dishonest men and methods, still dissatisfaction with this condition of affairs led many Republicans to break away from their party. Many were displeased, too, with the continued military control of the South. In 1872 these Republicans, taking the name Liberal Republicans, made a bitter fight against the renomination of General Grant, unjustly insisting that he was the source of all the corruption and misgovernment. When they found they could not hinder his renomination, they put forward a candidate of their own, selecting **Horace Greeley**, editor of the *New York Tribune*, a very able but eccentric man.

Greeley was a staunch Republican, a bitter enemy of slavery and secession, and the most prominent supporter of a protective tariff. He was expected to be a strong candidate, since for years the farmers of the country had taken their views of politics from what Greeley had to say in the weekly *Tribune*. His nomination by the Liberal Republicans, therefore, led the Democrats to hope that Grant could be beaten and they too, named Greeley as their candidate. But Greeley had been too violent a

Republican to be pleasing to most Democrats. Grant easily won, although the Democrats elected a majority of the representatives to Congress.

The First Civil Service Reform Bill

To halt corruption in office and secure good men for the offices, Congress passed in March of 1871 a bill establishing the first **US Civil Service Commission**. In accordance with this, the smaller positions in the government service, such as clerkships, were to be given to candidates on their merit, and not because of political favoritism. Unfortunately, Congress was not in earnest in wanting reform. President Grant wished to carry out the measure, but in 1874 Congress refused to vote money for the payment of the civil service board, and the reform perished for the time being.

Demonetization of Silver—1873:

Inflation Bill—1874:

Resumption Act—1875

Grant's second term was filled with financial concerns. In 1873 Congress passed a bill called the **Coinage Act of 1873**, making gold the standard of value in the United States, an act which later gave rise to much discussion and ill-feeling. Congress passed this bill because of the following:

In America's colonial days the demand for silver outran the supply. In result, silver continually increased in value in comparison with gold. Eventually this shifted when the supply of silver outstripped its demand, with the result that silver greatly declined in value as compared with gold.

In 1873 the government decided to use silver for small payments only. The silver dollar was eliminated, and "free coinage," or the ability to bring silver in large amounts to the mint to exchange for coins, was discontinued. This was called the **demonetization of silver**.

The following year, impelled by the belief of many citizens that "plenty of money was a good thing," Congress passed a bill known as the **Inflation Bill of 1874**, which would increase the paper money, known as "greenbacks," of the country enormously.

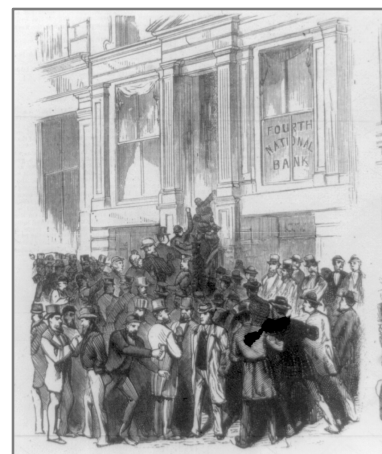
At the start of the Civil War, the government had issued greenbacks, not backed by gold or silver but only by the government's assurance that they would be honored, to help cover the costs of the war. After the war conservative financial experts wanted to discontinue the use of greenbacks, but others wanted to expand their use because more money in

circulation would mean higher wages and easier debt repayment.

President Grant, who believed that this would be a great evil because expanded circulation would also cause prices to rise, vetoed the bill. At this time the country had no gold or silver money in circulation, and, if the bill had been passed, it was unlikely that *specie* (money in physical, usually metal, form) would have come into general circulation for many years.

The business owners of the country urged that only by having gold or silver could business be put on a sound basis and prices kept from going constantly up and down. A one-dollar bill, measured in gold or silver, would not buy more than 80 or 90 cents worth of goods—thus paper money was not equal to its face value.

The **Financial Panic of 1873**, in which thousands were ruined, was largely owing to the unsettled state of the finances and the depreciated value of the paper currency. If more paper had been issued, a paper dollar would have been worth still less. Grant's veto, therefore, was a good one, and made him popular with many who had before disliked him. To hinder such bills in the future, a demand was now made that the country should return to gold and silver money, or "resume payments in specie," as it was called. In consequence, the Resumption Act was passed in January 1875, which declared that after the first of January 1879, the United States would pay all its debts in gold and silver, on demand.



Contemporary news illustration of a run on the 4th National Bank of New York during the Panic of 1873

The Great Sioux War of 1876

In 1874 gold was found in the Black Hills on the Great Sioux Reservation, which consisted of land belonging to the Sioux, Lakota, and Cheyenne

peoples. White men poured in and began digging the gold, despite the protest of the tribal groups, who refused to cede their ownership.

The government tried to settle the difficulty by offering to pay the tribes for the Black Hills land and moving them to a new reservation. They refused, and early in 1876, skirmishes began.

The climax came in June, when General George A. Custer with 262 men came upon a combined force of confederated Lakota tribes and Northern Cheyenne, led by war leaders Crazy Horse and Chief Gall, and inspired by Lakota leader Sitting Bull, in overwhelming numbers.

The **Battle of Little Bighorn** followed, which became a massacre, every one of Custer's band being killed, fighting desperately to the end.

The massacre struck horror in the people of the country. The government poured troops into the disputed territory, and after several more campaigns in the **Great Sioux War of 1876** the Native American tribes were forced to surrender and relocate.

Amnesty Bill—1872: Withdrawal of Troops from the South—1874 to 1877

In 1872 Congress passed the **Amnesty Bill** pardoning all who took part in the Civil War against the Union, excepting about 350 of the most prominent leaders. Federal troops were still deployed in the South, however, to protect the formerly enslaved people and others who wished to see them fairly dealt with in the right to vote and hold office as guaranteed in the Constitution.

The presence of these troops provoked constant trouble, riots, and outbreaks. These people of the North were now heartily tired of these difficulties. As President Grant said in 1874, "The whole public are tired out with these annual autumnal outbreaks in the South, and a great majority now are ready to condemn any interference on the part of the government."

Most of the troops were withdrawn during Grant's administration. The Reconstruction government vanished wherever this took place.

The election of 1874 was the turning point, although there was still interference by the national government due to claims of fraud at the elections. It was not until 1876 that the national government ceased its watchfulness over Southern elections.

The long struggle divided the political parties of the South along race lines—a condition most unfortunate for that part of the Union. The

Democratic "Solid South" was the result. The formerly enslaved man's right to vote was not denied but was rendered of little account by intimidation and other methods.

The Crédit Mobilier and Other Scandals: The Whiskey Ring

In 1872 charges were levied against the Union Pacific Railroad claiming that the builders had spent \$9,000,000 to bribe Congressmen. This was proved false in 1873, but many Congressmen were found to have taken stock in the railroad, and then to have voted it generous assistance. This was known as the **Crédit Mobilier Scandal**, taking its name from the name of the Pennsylvania railroad construction corporation, which was controlled by the Union Pacific Railway.

The administration itself was mixed up in two great scandals. The first of these involved the War Department. War Secretary William Worth Belknap and some of the under officials were accused of selling offices and forcing officers to pay in order to hold their positions. In 1876 the House voted unanimously to impeach Belknap. He then resigned the secretaryship and escaped all punishment.

The Treasury Department was also charged with several frauds. Some of its officials were sold the right to collect taxes, the proceeds to be shared between the buyer and the Treasury officials. In 1874 the acting secretary resigned, in consequence of the exposure of these frauds. B.H. Bristow of Kentucky became secretary, and immediately found himself face to face with the biggest fraud of all—the "**Whiskey Ring**." Internal Revenue officers and distillers of whiskey formed this ring with the purpose of cheating the government out of the revenue tax. By 1875 over \$2,800,000 had thus been stolen. Bristow, with the President's hearty assistance, fought the ring and broke it down in many places. But president and secretary together were not able to overthrow it completely. In fact, the ring was so strongly supported that in 1876 it forced the secretary out of office.

The same corruption was active in many of the city governments of the country, especially in that of New York. Here the infamous "Tweed Ring" running the Democratic organization **Tammany Hall** plundered right and left. They stole over \$160,000,000. In 1871 the city broke from the clutches of this ring and William "Boss" Tweed, the leader, was arrested, tried, convicted, and some years later died in jail.

The Ninth Census—1870

The ninth census of the United States showed a total population of 38,558,378—a gain of more than 7,000,000 people, and this, too, in spite of the Civil War. Of this number 4,880,009 were free African Americans. Since 1860 nearly 2,500,000 people had arrived from Europe—about half of them from the British Islands.

Campaign of 1876

Such was the situation the Republicans faced in 1876. The Democrats were consequently very confident. They nominated Samuel J. Tilden, reform governor of New York, as their choice for president. The Republicans named **Rutherford B. Hayes** of Ohio. A third party now appeared in the field, called the **Greenback Party**. It believed that the Resumption Act was unjust to the laboring man, who, it supposed, would be helped by a paper money not redeemable in specie.

The party declared for unlimited greenbacks and nominated Peter Cooper of New York as their candidate for president. After a bitter contest, the campaign ended with no one definitively elected. This result was because the boards that counted the electoral votes in Louisiana, Florida, and South

Carolina threw out Democratic votes and declared the states Republican. They did this on the ground that the Democrats in these states cheated in the election. In Oregon also there was a dispute as to whether the state had voted for the Democratic or the Republican candidate. If Tilden received only one of all these disputed electoral votes, he would be elected, while Hayes had to get them all. Both parties claimed the election. For a time it looked as if another civil war was about to break out.

The Electoral Commission

At last, however, Congress created a commission to decide the disputed votes. The **Electoral Commission** was made up of five senators, five representatives, and five members of the Supreme Court. Out of the fifteen, eight were Republicans, seven Democrats. On every disputed question eight members voted for the Republican claims and seven for the Democratic. Hayes was declared elected by a vote of 185 in the Electoral College to 184 awarded to Tilden. William A. Wheeler of New York was declared elected vice president.

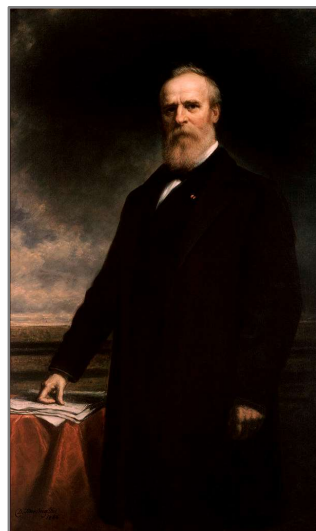
Since voter fraud occurred on both sides, it's difficult to determine which side legitimately won the election.

Lesson Two

History Overview and Assignments The Hayes, Garfield, and Arthur Administrations

“Hence it came to pass that legislation dealt with great commercial affairs, tariffs, financial questions, railroads, the creation of new states, the settlement of Alaska, foreign questions, the subject of a canal between the Atlantic and the Pacific, and with securing new territory. The acquisition of this new territory was the inevitable climax of the movement.”

— from the adapted article below



Rutherford Birchard Hayes,
official presidential portrait, by
Daniel Huntington (1884)

Key People, Places, and Events

Rutherford B. Hayes
Hayes's Southern Policy
Civil Service Reform
Resumption of Specie Payment
Bland-Allison Bill
James Garfield
Assassination of Garfield
Chester Arthur
Pendleton Civil Service Act of
1883
Chinese Exclusion Act
New Imperialism
Scramble for Africa
Suez Canal
Grover Cleveland

Suggested Reading and Assignments

- Review the vocabulary, then read the article: *The Hayes, Garfield, and Arthur Administrations*.
- Narrate about today's reading using the appropriate notebook page. Be sure to include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- For each heading listed in today's article, create a bullet point outline showing the main points made by the author. (A bullet point outline can be described as an informal outline using indentions or dashes behind which are listed the main points about a specific topic.) Use the website found on your **ArtiosHCS** curriculum website to explore the use of outlines.
- Conduct research on **one topic of your choice** from the lists of key people and events in this unit. Be prepared to share what you learned with your class.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Vocabulary

epoch
usurper
conciliation
acrimonious

Adapted for High School from the book:

History of the United States

by William M. Davidson

The Hayes, Garfield, and Arthur Administrations

Rutherford B. Hayes's Administration, Republican: 1877-1881

Rutherford Birchard Hayes, the nineteenth President of the United States, was born in Delaware, Ohio on October 4, 1822, the son of an Ohio farmer. He was educated in the common schools and at Kenyon College, Ohio. After leaving college, he studied law, was admitted to the bar, and soon proved himself an able lawyer. When the Civil War began, he enlisted in the Union army as a captain and rose to the rank of brevet major-general. In 1864 he was elected to Congress; in 1868 he became governor of Ohio, entered upon a second term in 1870, and a third in 1876. The same year he was elected president.

Mr. Hayes was an extremely able president, and as brave and honest as he was able.

The New Nation

The great amount of spending during the Civil War had brought about the great Panic of 1873. After the panic came the "hard times." Production dropped. The demand for labor diminished. Wages were everywhere reduced. Strikes became frequent, and riots followed the strikes.

The year 1877 closed the era of Reconstruction and opened another **epoch** in the nation's history. From that year we may say that a new nation was created, and new policies adopted. With the North and the South once more welded together and the old questions about slavery and states' rights shelved,

the people turned with astonishing energy to settle other problems. The keynote of this movement was expansion. Expansion in commerce and expansion in territory—consciously or unconsciously, these were the guiding objectives. Hence it came to pass that legislation dealt with great commercial affairs, tariffs, financial questions, railroads, the creation of new states, the settlement of Alaska, foreign questions, the subject of a canal between the Atlantic and the Pacific, and with securing new territory.

The acquisition of this new territory was the inevitable climax of the movement. It might be claimed that events beyond man's control made it certain, and similar events determined that the expansion would be to the south and in the extreme east. Hawaii, Puerto Rico, and the Philippines were added.

The President's Position

The new president took high ground on all questions which came before him, particularly regarding civil service and finance—questions which must be settled properly before the future of the nation could be assured. On both of these, Hayes was opposed by a considerable faction within his own party. **Hayes's "Southern policy"** still further exasperated this faction. The Democrats meanwhile were his bitter foes, regarding him as a **usurper** in the presidency on account of the manner of his election. Consequently, his administration was one of great difficulty.

Conciliation of the South: Hayes's Southern Policy

Hayes believed the only hope of healing the wounds created by the Civil War lay in conciliating the South. Statesmen perceived that this **conciliation** was necessary; that a divided nation could not possibly attain a great destiny. In making up his Cabinet Hayes held out the “olive branch of peace” by appointing as postmaster-general David M. Key, who was not only a Democrat but a Southerner and an ex-Confederate officer.

Hayes then consulted a number of Southerners, and upon receiving from them a promise to uphold the national laws in the South, he withdrew the troops from South Carolina and Louisiana. In consequence, for the first time since the war the South was solidly Democratic. Many Republicans bitterly opposed Hayes for bringing this about.

Civil Service Reform

His efforts on behalf of **civil service reform** were no less unpopular with this class of Republicans. Despite the refusal of Congress to vote money for the execution of the law, the President bravely attempted to bring about change in the Civil Service. He refused to allow senators and representatives to select the federal officers in their states and instructed the secretaries and other officials to base appointments to office solely on merit.

Hayes's opponents were deeply offended, and the Republicans in the Senate retaliated by refusing to consent to some of his nominations, especially that to the post of Collector in New York. Defeated once, the President returned to the charge in 1879. He insisted on the removal of the Collector and the naval officer at the port of New York, alleging that they had used their offices “to manage and control political affairs.” The officials denied the charge, and a heated struggle between the President and the Senate followed. The President finally won. He also removed the postmasters of New York and St. Louis and introduced civil service reform in both places. For these and like services to good government President Hayes deserves the thanks of all honest citizens.

Resumption of Specie Payment—1879

The act for resuming payments in coin, passed in 1875, was to go into effect January 1, 1879. The law had given rise to much emotion. Popular politicians all through the campaign of 1876 denounced the

policy, declaring that **Resumption of Specie Payment** was wrong, since it meant the end of inflation. Ceaseless floods of paper money and endless rising and falling of prices were the demands of this class. Many Republicans adopted these notions and wished to give up the plan of Resumption. With these Hayes did not agree. Resumption, he said, was honest; it was best for American trade, especially American trade with other countries. Inflation, on the other hand, would destroy the nation's reputation for honesty abroad and would be ruinous to thousands.

In his policy he was strongly supported by his able secretary of the Treasury, John Sherman of Ohio. In preparation for the day of Resumption, the secretary began to collect coin, and by the sale of bonds he procured \$140,000,000 which was to be used in redeeming the greenbacks. Many prophesied that the attempt would be a failure; that when the day of Resumption arrived, everyone would be eager to change his paper into specie, a panic would follow, and thousands would be ruined.

Not a word of this came true. On January 1, 1879, the policy of Resumption was successfully carried out. The Treasury of the United States was open to pay coin for the greenbacks of all who came, and scarcely anyone came. When people found that they could have coin for paper they did not want it. All that anyone wished to know, in reference to specie, was that he could have it when he asked for it. From that day the paper money was as good as gold and silver. It had not been so before.

The Silver Question:

The Bland-Allison Bill—1878

Even before the paper money problem was settled, a new financial question came up—the silver question. For years silver had been growing less and less valuable, until in 1878 a silver dollar contained only about ninety cents worth of silver. Now a new doctrine arose which held that silver money should be made by law equal to gold, whether it was actually so or not, and that the United States should coin into dollars all silver that was offered to it.

The law of 1873, making gold the only standard of value, had made this impossible. If now a law passed compelling people to take silver on an equal basis with gold, all debtors would pay their debts in silver and creditors would lose ten cents in every dollar owed to them. As paper had driven coin out of circulation, so silver would drive out gold, and as it continued to reduce in value, prices would frequently

go up and down once more, and there would be much loss. Hayes said this was a scheme for cheating. If people wanted a silver dollar to pass as a dollar, a dollar's worth of silver ought to be put into it.

Congress did not agree with the President. It tried a compromise. It would not pass a bill to have all silver coined and to be equal to gold in paying debts. But it did pass a bill ordering the secretary of the Treasury to buy at least 2,000,000 ounces of silver every month and make silver dollars out of it. This was called the **Bland-Allison Bill**. The President vetoed it, but Congress passed it over his veto in February 1878. The coinage of silver being limited and the silver not being payable in all debts, the silver dollars become worth as much as gold dollars, and the gold remained in the country.

Colorado Admitted—1876: The Tenth Census—1880

Colorado was admitted into the Union as the thirty-eighth state in 1876. Four years later the tenth census of the United States was taken, disclosing the fact that the United States had a total population of 50,155,783. Included in this population were 6,580,793 African Americans, 104,565 Chinese, 148 Japanese, and 66,407 registered Native Americans. During the ten years closing with 1880, nearly 3,000,000 immigrants arrived in the United States—about a million of whom were from the British Islands.

The Presidential Election of 1880

Hayes had no chance of a renomination, his policy having made him very unpopular. Many Republicans wished to nominate General Grant for a third term. This gave rise to a cry of kingship and alarmed many people with the idea of a life presidency. The third term idea was unpopular, and Grant failed to gain the nomination. Instead, **James Garfield** was named. The Democrats nominated General Winfield S. Hancock. Garfield was elected by a vote in the electoral college of 214 votes to 155 cast for Hancock. Chester Alan Arthur was elected vice president.

James Garfield's Administration, Republican: 1881

James Garfield, twentieth President of the United States, was born at Orange, Ohio on November 19, 1831, the son of poor parents. His father died when he was still an infant. As a boy Garfield worked hard for a living, being employed as

a mule-driver on a canal. He had already shown exceptional brilliance, learning to read at the age of three. Naturally he desired an education and struggled to attain it. He attended Hiram College in Ohio and afterwards was graduated at Williams College in Massachusetts. He then became a professor in Hiram College, and later its president. Meanwhile he was admitted to the bar.

In 1859 he was a senator in the Ohio legislature. When the war began, he was made lieutenant-colonel and rose to the rank of major-general. He was elected to the United States House of Representatives in 1863 and remained there until 1880. In that year he was elected United States senator, but before he took his seat, he was made president by the Republican Party.

The Blaine and Conkling Political Quarrel

When Garfield became president, he appointed James G. Blaine secretary of state, an act which enraged Senator Roscoe Conkling of New York, who personally disliked Blaine. A struggle followed between the Blaine and Conkling factions of the Republican Party. The President joined himself wholly to the Blaine wing and struck at the New York senator by appointing Conkling's enemies in New York to the federal offices in that state.

In an overwhelming rage, both the New York senators, Conkling and Thomas C. Platt, resigned their seats in the United States Senate. They then carried the fight to the New York legislature, asking for a reelection to the Senate as a blow to the President. They expected an easy success, and as a result a brilliant victory over the President and Secretary Blaine. To their amazement, the New York legislature refused to elect them, and the President was left victor of the field.

Assassination of Garfield

The excitement caused by this political quarrel affected the mind of a half-mad and disappointed office-seeker named Charles Jules Guiteau. This wretched man, on the morning of July 2, shot Garfield as he stood in the ticket office of the Baltimore and Ohio Railroad in Washington. The President was not killed, however, and the utmost efforts were made to save his life. It was all in vain, and after almost three months of agony, the brave and brilliant statesman passed away at Elberon, New Jersey on September 19, 1881. The assassin was tried and executed.

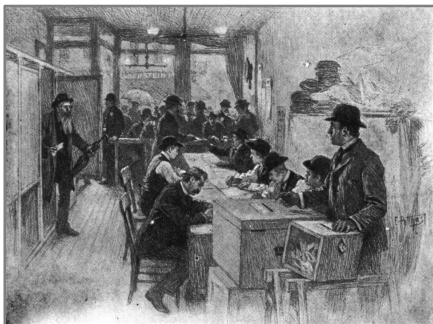
Chester Arthur's Administration, Republican: 1881-1885

Chester Arthur, who on the death of Garfield became the twenty-first President of the United States, was born in Fairfield, Vermont on October 5, 1830, the son of a Vermont clergyman. He was graduated from Union College in the state of New York and in 1853 began the practice of law. In 1871 Grant appointed him collector of the Port of New York, which position he held until 1878. In 1880 he was nominated for vice president by the Republicans. He became president on the 20th of September 1881. After his presidency he retired to New York City, where he died on November 18, 1886.

The Pendleton Civil Service Act of 1883

In spite of the efforts of President Hayes, much corruption still existed in political life. The Star Route frauds in 1881 attracted universal attention to the disgraceful fact. This scandal involved a scheme in which United States postal officials awarded delivery contracts in southern and western areas in exchange for bribes. This, along with the **acrimonious** fight over the New York legislative offices during Garfield's administration, convinced everyone that an earnest effort should be made to end this wretched state of affairs.

In January 1883, urged forward by the voice of the people, Congress passed the **Pendleton Civil Service Act**. Under this act, appointments to the civil service are made only after an examination is passed by the applicants for the offices. The President also appoints a civil service commission to see that the law is properly carried out. President Arthur supported the law faithfully, and his example has been followed by succeeding presidents. The result has been excellent, and the principle of civil service reform was soon introduced into many states and cities. Spoils politicians oppose the policy, but this is one of the best reasons why every honest citizen should support it.



A New York polling place, showing booths on the left

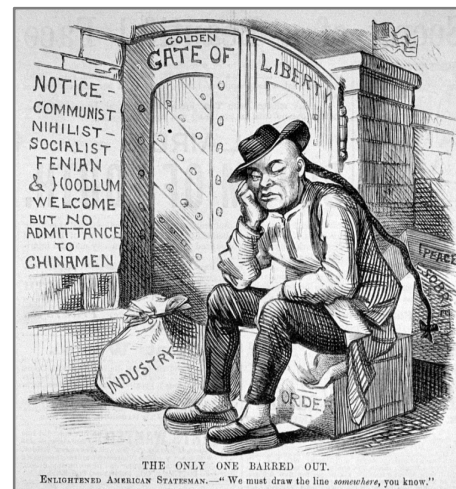
The Australian Ballot

Another plan making for purity in politics was the 1888 introduction of the Australian ballot, by which citizens vote secretly for the candidate of their choice. This secret system of voting put an end to most of the opportunities for bribery and intimidation in voting.

Acts Against Immigration

The United States has received vast benefits from the coming of intelligent immigrants of good habits. After the Civil War, however, the character of immigration became objectionable, and crime increased in America. To put an end to this, the Immigration Act of 1882 was passed, dictating that if there should be found on an incoming vessel "any convict, lunatic, idiot, or any person unable to take care of him or herself without becoming a public charge," it should be reported in writing to the collector of such port, and "such person shall not be permitted to land."

In the same year another law shut out Chinese immigrants for ten years. The Chinese came to America first at the time of the gold excitement in California. Later large numbers came to assist in building the Pacific railroads. A constantly increasing stream of Chinese workers poured into the United States. As these immigrants worked for the lowest wages, other laborers soon found difficulty in getting work. The result was a movement to drive them out. Chinese immigrants were mobbed, beaten, and killed, and a demand came from California and the West for their exclusion from the United States. Hereupon the law known as the **Chinese Exclusion Act** was passed in 1882.



A political cartoon from 1882 criticizing Chinese exclusion

Soon afterward, the 1885 Alien Contract Labor Law, designed to protect job opportunities for American workers, prohibited employers to import foreigners under contract or agreement to perform labor in the United States.

New Imperialism

The late nineteenth century marked the beginning of a new rise of worldwide colonial expansionism that became known as **New Imperialism**. European powers, motivated by increasing needs for natural resources to fuel industrial advancements, new markets for exported products, land for expansion, bases for supplying ships with coal and goods, and nationalistic pride, sought control over continental regions and islands that could be subjugated. During this period, European practice changed from military and economic occupation of selected regions to the establishment of direct colonial rule. Public attitude in Europe became paternalistic, believing that the “advancements of civilization” would prove in time to be worth the oppression required to achieve them.

Africa

In response to increasingly heated European competition for control over territories in Africa, German chancellor Otto von Bismarck called on diplomats from 13 European nations and the US to meet peacefully and discuss the situation. The objective of the resulting Berlin Conference, which lasted from November 1884 to the end of February 1885, was to craft a joint policy by which Africa would be “colonized and civilized.” To forestall retaliation from Britain and France over German expeditions, Belgium’s King Leopold II persuaded France and Germany to engage in common trade, which would further the interests of the colonizing countries and hopefully limit future hostilities. Agreements were also made requiring effective political occupation of land over which rights would be claimed and prohibiting the slave trade.

Despite the rules agreed upon, the conference touched off what became known as the **Scramble for Africa**, in which most of the African continent was invaded, occupied, and colonized by rival Western European powers over the following three decades.

India

In India, the British crown took direct control after suppressing the Sepoy Rebellion of 1857, completely reorganizing the economic and political system. Farmers were required to grow cash crops for export, while textiles were imported

for sale from Britain. Railroads, telegraph lines, and canals were constructed to connect Indian cultural centers and facilitate trade, rents were demanded for land use, and the profitable salt production industry was tightly controlled and taxed. Western education was introduced, but schooling for the Indian students was of poor quality. A group of educated Indians founded the Indian National Congress, which demanded equal treatment and self-government.

China

China’s defeat by the British in the First Opium War in 1840 had led to the Treaty of Nanking, by which China was compelled to cede Hong Kong to Britain, open four new trading ports, and resume the importation of opium. Use of the dangerous substance continued to increase in China, adversely affecting societal stability. In 1860, after the Opium Wars ended, a series of treaties called the Convention of Peking were made between the weakened Qing dynasty and Western powers. Concessions forced upon China opened more ports of trade and allowed foreign travel to the interior.

The Suez Canal

From the time of the pharaohs through Napoleon, Egypt and conquering nations had tried and failed to create a stable waterway to the Red Sea from either the Nile River or the Mediterranean. In 1859 a French diplomat named Ferdinand de Lesseps gained permission from the Egyptian government to build a canal directly linking the Mediterranean to the Red Sea. An international company was organized, construction was soon underway, and the 100-mile-long **Suez Canal** was completed in 1869, owned by Egypt and controlled by the French. A direct route was now available between the North Atlantic and northern Indian oceans

Great Britain, which didn’t participate at first out of fear that increased travel through this area would threaten their trading supremacy with Asia, eventually recognized the importance of the canal and purchased Egypt’s shares in 1875. Local unrest in Egypt led to a British invasion seven years later, by which Great Britain gained full control over the canal’s operations. France, garnering international pressure, compelled Britain in 1888 to compromise by means of a treaty called the Convention of Constantinople. This treaty declared the canal a neutral zone, guaranteeing right of passage to all ships during times of war and of peace, under Great Britain’s protection.

The Balkans and the Near East

Russia's desire for control over territory between the Black and Mediterranean seas didn't end with the Crimean War in 1856. Two decades later Russia initiated war again, defeating the Turks and driving out the Ottomans. But European nations, concerned again about balance of power, stepped in once more, forcing Russia at the Congress of Berlin in 1878 to return some of the Turkish territories. This didn't stop the expansionist nation from continuing to push south toward the Persian Gulf, though, as well as eastward into Manchuria, in pursuit of a warm-water port.

The Presidential Campaign of 1884

In 1884 James G. Blaine of Maine, who had played a prominent part in politics as Speaker of the House, and as Garfield's secretary of state, was nominated for president by the Republicans. The

Democrats selected **Grover Cleveland** of New York and took up the cry of reform in government. A strong body of independent Republicans declared against Blaine. These became known as "mugwumps," and through their influence in the election, Blaine lost the electoral vote of New York, in which state the independents were especially numerous. The majority against Blaine was about one thousand votes. Fraud was charged in that state and the vote contested in the Supreme Court of New York.

Before the case came to trial, Cleveland was inaugurated, and the excitement subsided. The New York Supreme Court afterward rendered a verdict which in effect declared that the New York electoral vote should have been given to Blaine. But wisely the matter was dropped there. The country did not wish to be disturbed by another contest as threatening as the Hayes and Tilden contest of 1876.

Lesson Three

History Overview and Assignments Grover Cleveland

"Cleveland was the first Democratic president since 1869, and both parties regarded his election as a revolution. The Democrats for the most part expected that a clean sweep would be made in the offices; many Republicans feared the breaking up of the government, some even gloomily predicting that slavery would be reestablished. All these absurd expectations were happily disappointed."

– from the adapted article below



Grover Cleveland, official presidential portrait, by Eastman Johnson (1899)

Suggested Reading and Assignments

- Read the article: *Grover Cleveland*.
- Narrate about today's reading using the appropriate notebook page. Be sure to include key people, events, and dates within the narration.
- For each heading listed in today's article, create a bullet point outline showing the main points made by the author. (A bullet point outline can be described as an informal outline using indentions or dashes behind which are listed the main points about a specific topic.) Use the website found on your **ArtiosHCS** curriculum website to explore the use of outlines.
- Conduct research on **one topic of your choice** from the lists of key people and events in this unit. Be prepared to share what you learned with your class.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

Grover Cleveland

Presidential Succession Act of 1886

Interstate Commerce Act

Adapted for High School from the book:

History of the United States

by William M. Davidson

Grover Cleveland

Grover Cleveland's First Administration, Democratic: 1885-1889

Grover Cleveland, the twenty-second President of the United States, was the son of a Presbyterian clergyman. He was born in Caldwell, New Jersey on March 18, 1837. He received a public school education and later taught in the New York Institution for the Blind. In 1859 he became a lawyer; in 1871 he was elected sheriff of Erie County, New York, and in 1881 mayor of Buffalo. He made so excellent a record as reform mayor of that city that the Democrats in 1882 made him governor of New York. In 1884 he was elected President of the United States. In 1888 the Democrats renominated him, but he was defeated by Benjamin Harrison. He then took up the practice of law in New York City. In 1892 he was again elected president.

Return of the Democrats to Power

The great significance of Cleveland's first administration lay in the fact that the Southerners were once again admitted to a share in the government of the nation. It marked, therefore, the reunion of the American people.

Cleveland was the first Democratic president since 1869, and both parties regarded his election as a revolution. The Democrats for the most part expected that a clean sweep would be made in the offices; many Republicans feared the breaking up of the government, some even gloomily predicting that slavery would be reestablished. All these absurd expectations were happily disappointed.

Cleveland and the Spoils Systems

The keenest disappointment, however, was felt by those who had rallied around Cleveland to "turn the rascals out," in other words to secure government positions for themselves. Cleveland was a reformer, supported by reformers, and he set himself like granite against the spoils system.

"Gentlemen," said a Southern politician sadly, "I ear there will be some difficulty about the offices." So

there was. The new president would not turn out "the rascals" in anything like the desired numbers.

Private Pension Bills

Cleveland also believed that it was the job of reform to put an end to what he considered excessive pensions. He said men were every year drawing millions of dollars from the government without any just claim whatever; that it was in the interests of the honest veterans that the underserving should not receive pensions. The abuses, he thought, were largely due to the passage of private pension bills by Congress, whereas Congress ought to leave the decision in such matters to the Pension Bureau. He therefore declared war against private pension bills and vetoed many of them. In 1887 he also vetoed the Dependent Pension Bill, which would have given pensions to all poor veterans who had served three months in the Union armies. Cleveland's pension policy met with much opposition in the North, where it was felt that nothing was too good for all honest and worthy Union veterans who had offered their services and their lives in the defense of their country.

Presidential Succession Bill—1886

In 1886 Congress passed a bill providing for the succession to the presidency in case both the president and the vice president should die or be unable to exercise the office. Under the **Presidential Succession Act of 1886**, the secretary of state was selected to succeed the vice president should the need arise, and then would come the secretary of the Treasury, the secretary of war, and the other Cabinet officers in the order of the creation of the departments. This arrangement made it impossible that the office of the president should ever be vacant.

Note: This act has undergone several revisions, and the current successor to the US vice president is the Speaker of the House.

The Interstate Commerce Act

The great railroads of the United States possess enormous power over the trade and commerce of the country. If they combined, they could charge what prices they pleased for carrying freight. Again, they may carry one customer's goods at a cheaper rate than those of another, to the ruin of the one against whom they discriminate. In many instances the railroads had done this. In 1887 an attempt was made to stop such practices by the passage of the **Interstate Commerce Act**. This forbids railroads to make distinctions in terms for which they will carry freight for different persons, or to combine to fix rates. The law also created a body called the Interstate Commerce Commission to see that the railroads obeyed its provisions.

Fishery Questions

Most of America's early foreign difficulties were with England, since she possessed large colonies on this continent. During Cleveland's first administration, serious disputes arose over the question of fishery rights. Disagreement came first over the claim of Americans of the right to catch fish along the shores of Canada. The right to fish there had been given to the US by the Treaty of Washington in 1871. This treaty expired in 1885, and trouble immediately arose. Of course American fishermen could continue their fishing on the high seas, and the dispute related to this question: What are the "high seas"?

America said that any part of the sea three miles from the shore was part of the high seas. Great Britain said that this principle was not correct when applied to bays, that the Americans could not fish in the bays on the Canadian coast, no matter how far they were from land. The New England fishermen continued to fish inside the bays, so England began to

seize American vessels found within these waters. For a time it looked as if war was certain, but in 1888 a compromise was reached. Americans were to secure English licenses if they wished to continue fishing within the disputed waters.

Another fishery dispute concerned the taking of seals in Bering Sea. The United States claimed that the whole of the Bering Sea belonged to her, and that Englishmen had no right to catch seals anywhere in this sea. This claim, so opposed to the demands in regard to the bays of Newfoundland, was indignantly rejected by England. In 1886, however, the Americans began to seize English sealing vessels in the Bering Sea. After much debate and a great deal of irritation the question was submitted to an international court of arbitration, which decided in 1893 that America was mistaken in claiming this entire sea as her private property.

Protective Tariff

During the Civil War high tariff rates were imposed upon nearly every article imported to the United States. When the other war taxes were repealed, the tariff was allowed to stand as it was. Thus the nation found itself almost unconsciously committed to a high protective tariff. The Republicans supported this policy and the Democrats opposed it. Nevertheless, the issue was not clearly drawn.

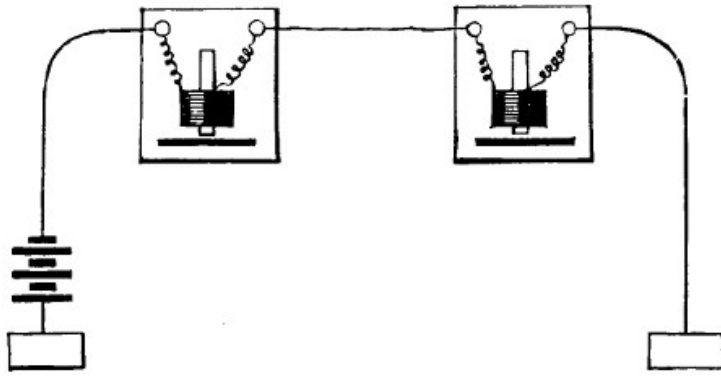
In 1880 the question entered into the campaign, but only in a minor degree. In 1883 some reductions were made in rates, but they were of no consequence. In 1887, however, President Cleveland made the tariff a party issue. His message of that year insisted on lowering the rates and declared for a tariff on revenue. Though such a tariff might give some protection, revenue was aimed at here, not protection.

Lesson Four

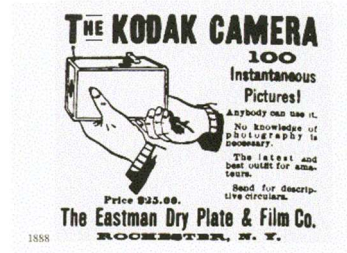
History Overview and Assignments Advances in Technology and Science

"In the Old Testament Book of Job, chapter 38 verse 35, it is written: 'Canst thou send lightnings that they may go and say unto thee—'Here we are?'" For thousands of years this challenge to Job has been looked upon as a feat whose execution was only within the power of the Almighty; but today the inventor—that patient modern Job—has accomplished this seemingly impossible task, for at the end of this nineteenth century of the Christian Era, the telephone makes the lightning man's vocal messenger, tireless, faithful, and true, knowing no prevarication, and swifter than the winged messenger of the gods."

— Edward W. Byrn



Alexander Graham Bell's Telephone, January 30, 1877



An advertisement from 1888 of the first Kodak camera

Suggested Reading and Assignments

- Read the article: *Agents of Communication*.
- For each heading listed in today's article, create a bullet point outline showing the main points made by the author. (A bullet point outline can be described as an informal outline using indentions or dashes behind which are listed the main points about a specific topic.) Use the website found on your **ArtiosHCS** curriculum website to explore the use of outlines.
- Complete your research on the **topic of your choice** from the lists of key people and events in this unit and share what you learned with your class.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

Invention of the telephone
Alexander Graham Bell
Thomas A. Edison
Invention of the phonograph

George Eastman
Invention of the camera
Kodak
Louis Pasteur

Charles Darwin
Darwinism

Adapted for High School from the book:

The Age of Invention, a Chronicle of Mechanical Conquest by Holland Thompson *Agents of Communication*

The Telephone

Τηλε (*far*), and φωνη (*sound*), are the Greek roots from which the word **telephone** is derived. It means "transmitting sound to distant points" and is a word predating the present speaking telephone, although this fact is generally lost sight of in the dazzling brilliance of this invention.

In an effort to hear approaching sounds better, the Native American was accustomed to place his ear to the ground. Children of former generations also made use of a toy known as the "lovers' telegraph"—a piece of string held under tension between the flexible bottoms of two tin boxes—the boxes when spoken into transmitted through the string the vibrations from one to the other, and made audible words spoken at a distance. These expedients simply made available the superior conductivity of the solid body over the air to transmit sound waves. The electromagnetic

telephone operates on an entirely different principle. It is a marvelous creation of genius which stands alone as the unique, superb, and unapproachable triumph of the nineteenth century. For subtlety of principle, impressiveness of action, and breadth of results, there is nothing comparable with it among mechanical agencies. In its wonderful function of placing one intelligent being in direct vocal and sympathetic communication with another a thousand miles away, its intangible and mysterious mode of action suggests to the imagination that unseen medium of prayer rising from the conscious human heart to its omniscient and responsive God. The telegraph and railroad had already brought all the peoples of the earth into intimate communication and made them close kin, but the telephone transformed them into the closer relationship of families, and the tiny wire, sentient

and responsive with its unlimited burden of human thoughts and human feelings, forms one of the great vital cords in the solidarity of the human family.

It is a curious fact that many, and perhaps most, great inventions have been in the nature of accidental discoveries, the by-products of thought directed in another channel, and seeking other results, but the telephone does not belong to this class. It is the logical and magnificent outcome of persistent thought and experiment in the direction of the electrical transmittal of speech. Professor **Alexander Graham Bell** had this objective point, and keeping it steadily in view, worked faithfully for the accomplishment of his object in producing a speaking telephone, until success crowned his work. He probably did not realize at first the full magnitude of the achievement but looking at it from the end of the nineteenth century, he might well have exclaimed in the language of Horace: "Exegi monumentum aere perennius" ("I have built a monument more lasting than bronze").

Prof. Bell's conception of the telephone dates back as far as 1874. His first United States patent, No. 174,465, was granted March 7, 1876, and his second January 30, 1877, No. 186,787. It is generally the fate of most inventions, even of a meritorious order, to languish for many years, and frequently through the whole term of the patent, before receiving full recognition and adoption by the public, but the meteoric brilliance of this invention at its first public announcement astonished the masses and inspired the admiration of the ingenious thinkers of the world. When exhibited at the Centennial Exhibition in Philadelphia in 1876, it was spoken of by Sir William Thomson, and Prof. Henry, as the "greatest by far of all the marvels of the electric telegraph."

Prof. Bell had made a special study of articulate speech and knew that speech was composed of an irregular and discordant medley of vowel and consonant sounds, whose vibrations varied not only in pitch or rapidity like musical tones, but also in the quality or kind of vibrations as to range and loudness. In his invention, he used a sensitive plan of a constantly closed circuit and caused the current to undulate in it by a principle of magnetic induction.

Prof. Bell caused the vocal air vibrations to undulate or oscillate a continuously closed circuit by the principle of magnetic induction. Not only were sounds thus reproduced, but as the circuit was continuous and never broken by any separating contacts, the extreme sensitivity of the electric vibrations set up by magnetic induction

was such that the discordant and irregular quality of the vibrations of articulate speech were transferred and reproduced with exact fidelity, as well as the musical tones, and this rendered the speaking telephone a success.

In the Old Testament Book of Job, chapter 38 verse 35, it is written: "Canst thou send lightnings that they may go and say unto thee—'Here we are?'" For thousands of years this challenge to Job has been looked upon as a feat whose execution was only within the power of the Almighty; but today the inventor—that patient modern Job—has accomplished this seemingly impossible task, for at the end of this nineteenth century of the Christian Era, the telephone makes the lightning man's vocal messenger, tireless, faithful, and true, knowing no prevarication, and swifter than the winged messenger of the gods.

—Adapted from *The Progress of Invention in the Nineteenth Century*, by Edward W. Byrn



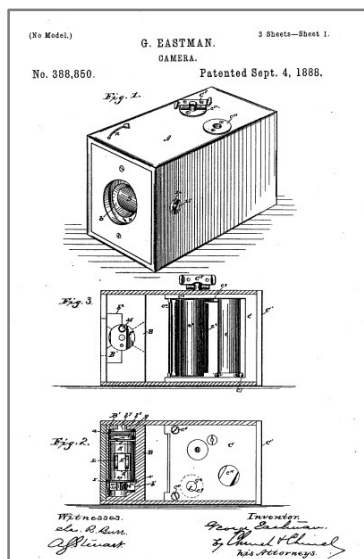
Thomas Edison with phonograph

The Phonograph

Besides the electric telegraph and the telephone, there was another nineteenth-century instrument for recording and reproducing sound which should not be forgotten. It was in 1877 that **Thomas Alva Edison** invented the first **phonograph**. The air vibrations set up by the human voice were utilized to make minute indentations on a sheet of tinfoil placed over a metallic cylinder, and the machine would then reproduce the sounds which had caused the indentations. The record wore out after a few reproductions, however, and Edison was too busy to develop his idea further for a time, though later he returned to it.

The phonograph eventually appeared under various names, but by whatever name they were called, the best devices reproduced with wonderful fidelity the human voice, in speech or song, and the

tones of either a single instrument or a whole orchestra. The most distinguished musicians were glad to do their best for the preservation and reproduction of their art, and through these machines, good music was brought to thousands to whom it could come in no other way.



US patent no. 388,850, issued to George Eastman, September 4, 1888

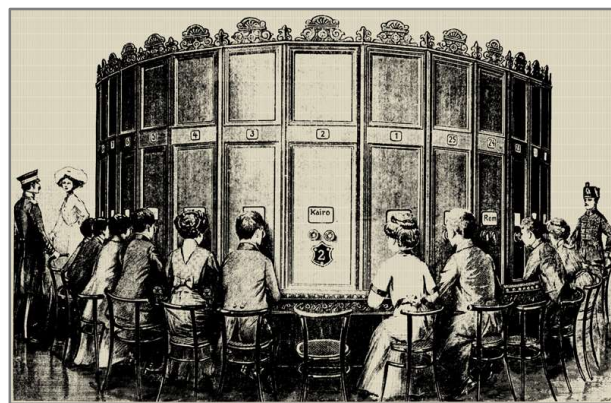
The Camera

The camera bears a large part in the diffusion of intelligence, and the second half of the nineteenth century in the United States saw a great development in photography and photoengraving. The earliest experiments in photography belonged almost exclusively to Europe. Samuel Morse first introduced the secret to America and interested his friend John W. Draper, who had a part in the perfection of the dry plate and who was one of the first, if not the very first, to take a portrait by photography.

The world's greatest inventor in photography was, however, **George Eastman** of Rochester. It was in 1888 that Eastman invented a new camera, which he called by the distinctive name **Kodak**, and with it came the slogan: "You press the button, we do the rest." This first Kodak was loaded with a roll of sensitized paper long enough for a hundred exposures. Sent to the makers, the roll could itself be developed and pictures could be printed from it. Eastman had been an amateur photographer when the hobby was both expensive and tedious. Inventing a method of making dry plates, he began to manufacture them in a small way as early as 1880. After the first Kodak, there came others filled with rolls of sensitized nitro-cellulose film. Priority in the invention of the cellulose film instead of glass, which

has revolutionized photography, was decided by the courts to belong to the Reverend Hannibal Goodwin, but honor nonetheless belongs to Eastman, who independently worked out his process and gave photography to the millions. The introduction by the Eastman Kodak Company of a film cartridge which could be inserted or removed without retiring to a dark room removed the chief difficulty hindering amateurs, and a camera of some sort, varying in price from a dollar or two to as many hundreds, is today an indispensable piece of vacation equipment.

In the development of moving pictures Thomas Edison played a large part. Many were the efforts to give the appearance of movement to pictures before the first real entertainment was staged by Henry Heyl of Philadelphia. Heyl's pictures were on glass plates fixed in the circumference of a wheel, and each was brought and held for a part of a second before the lens. This method was obviously too slow and too expensive. Edison with his keen mind approached the difficulty and after a prolonged series of experiments arrived at the decision that a continuous tape-like film would be necessary. He invented the first practical "taking" camera and evoked the enthusiastic cooperation of George Eastman in the production of this tape-like film, and the modern **motion picture** was born. The projecting machine was substantially like the "taking" camera and was so used. Other inventors, such as Paul in England and Lumiere in France, produced other types of projecting machines, which differed only in mechanical details.



A drawing of a Kaiserpanorama with 25 viewing stations. This rotating precursor to motion pictures, devised by German physicist August Fuhrmann, provided stereoscopic viewing of images.

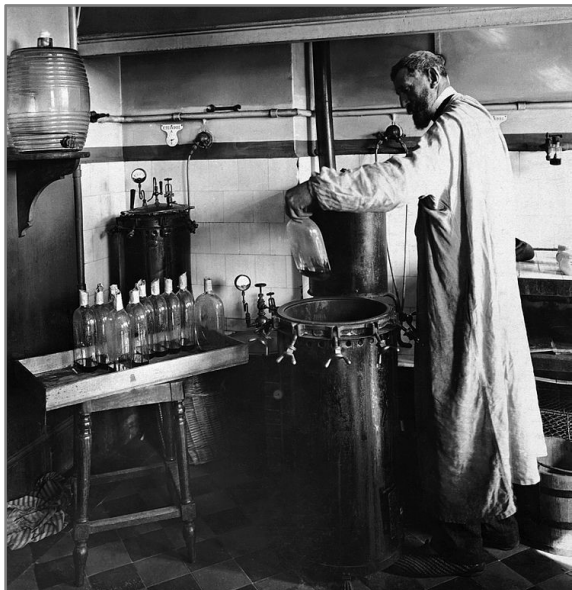
When the motion picture was taken up in earnest in the United States the world stared in astonishment, and soon there was hardly a town in the nation where there was not at least one moving-

picture house. The most popular early actors were drawn from the speaking stage into the “movies.” In the small town, the picture theater was often a converted storeroom, but in the cities, some of the largest and most attractive theaters were given over to the pictures, and others even more luxurious were specially built. The Eastman Company alone soon manufactured about ten thousand miles of film every month.



A frame from *Roundhay Garden Scene*, the world's earliest surviving film produced using a motion picture camera, by Louis Le Prince (1888)

Besides affording amusement to millions, the moving picture was also turned to instruction. Important news events were shown on the screen, and historical events were preserved for posterity by depositing the films in a vault. What would the historical scholar not give for a film faithfully portraying the inauguration of George Washington! The motion picture became an important factor in instruction in history and science in the schools, and this development continues today.



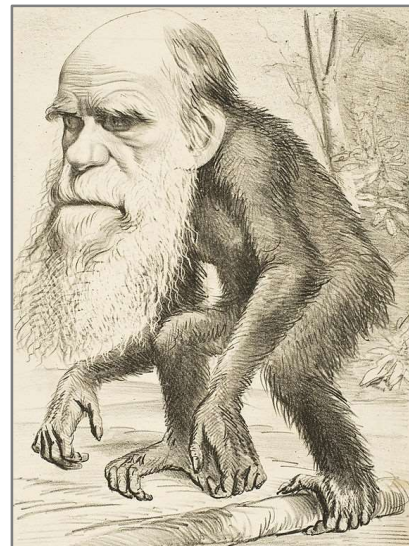
Pasteur experimenting in his laboratory

Nineteenth Century Science

It was in the nineteenth century that the term “scientist” was coined, and science became recognized as a profession. Within the realm of natural science during this era, the most influential events included French microbiologist **Louis Pasteur’s** advancements in the field of germ theory that led to the rabies vaccine and pasteurization, discoveries in the field of chemistry that led to the development of atomic theory and the periodic table of elements, others in physics that led to the study of electromagnetism and thermodynamics, and the theory of natural selection developed by **Charles Darwin** (1809-1882).

In the middle of the century this English naturalist proposed a theory of biological evolution in which all species of organisms are believed to develop by means of a process he called natural selection, in which inherited genetic variations increase the survivability of subsequent generations. This theory, which became known as **Darwinism**, gained wide scientific acceptance after the publication of Darwin’s work titled *On the Origin of Species* in 1859.

Darwin’s theory of natural selection spurred a tremendous revolution in thinking. Sadly, this theory has been horribly misused as philosophical justification for numerous forms of racism. This brought about devastating consequences, such as prevalent English disregard for the plight of starving Irish during the 18th century potato famine. Later, it also gave rise to the concept of racial superiority espoused by the Nazis during World War II.



An 1871 caricature following publication of *The Descent of Man* was typical of many showing Darwin with an ape body, identifying him in popular culture as the leading author of evolutionary theory.

The Artios Home Companion Series

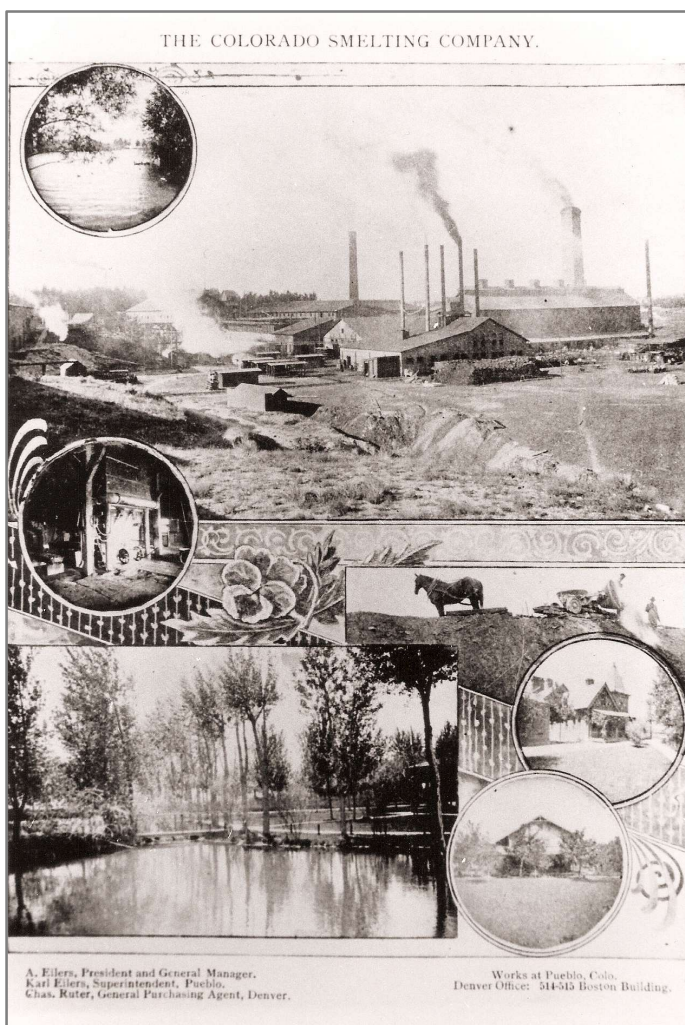
Unit 7: Industries and the Great American West

Teacher Overview

SO FAR THIS YEAR we have been studying the people engaged in the great conflicts through which the world passed during the mid-nineteenth century. But it's important to remember that while only a small percentage of the world's people perform notable deeds during the stirring events of history, many more work hard and faithfully to furnish all with food, clothing, and other things needed for everyday living. With this thought in mind, let us take a brief glance at a few of America's great industries that developed and flourished during the time following the Civil War.

After the war, westward expansion drove the need for more means of transportation. As more and increasingly convenient means of transportation developed, more and more people were able to move west. Cities and towns were planned and built ahead of the arrivals of many of these settlers. Businessmen, who saw an opportunity for investment, aided in the development.

Note: The articles contained in this unit were written early in the twentieth century. Thus, it is important to note that some of the statistics and prevailing attitudes pertain to that era. We use articles written in earlier times as a basis for comparing and contrasting cultural characteristics of historical and current societies, as well as to illustrate the economic and technological progress that has occurred since those times.



Colorado Smelting Company advertisement (1899)

Suggested Assignments

In this unit, students will:

- Complete three lessons in which they will learn about **postwar American industries** and **the development of the great American West**, journaling as they read.
- Conduct research on one of the following: **Joel Palmer**, **Horace Tabor**, **Horace Greeley**, or **William F. "Buffalo Bill" Cody**.
- For each heading listed in today's article, create a bullet point outline showing the main points made by the author. (A bullet point outline can be described as an informal outline using indentions or dashes behind which are listed the main points about a specific topic.) Use the website found on your **ArtiosHCS** curriculum website to explore the use of outlines.
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

Honesty is a character quality to be desired.

The integrity of the upright guides them, but the crookedness of the treacherous destroys them.

– Proverbs 11:3

God hates ungodliness and slavery.

Now we know that the law is good, if one uses it lawfully, understanding this, that the law is not laid down for the just but for the lawless and disobedient, for the ungodly and sinners . . . enslavers, liars, perjurers, and whatever else is contrary to sound doctrine.

– 1 Timothy 1: 8-10

God created all human beings equal in His sight. Although we may have different and individual God-ordained purposes, God sees us as equal.

There is neither Jew nor Greek, there is neither slave nor free, there is no male and female, for you are all one in Christ Jesus.

– Galatians 3:28

Each person is called by God to do work, in order to contribute to the community in which he lives.

For even when we were with you, we would give you this command: If anyone is not willing to work, let him not eat.

– 2 Thessalonians 3:10

Lesson One

History Overview and Assignments Postwar Industries

“Owing to the favorable climate of the southern states, it being warm and moist, the United States produces more cotton and cotton of a better quality than any other country in the world. Another great industry is the growing of wheat, which is the foundation of much of the world’s food. . . . Wheat is a very important grain and is extensively cultivated. There are many varieties, the two main kinds found in the United States being the large-kernel winter wheat, grown in the East, and the hard spring wheat, the best for flour-making, which is grown in the West. . . . The third and fourth great industries found in the United States at the time this article was written were cattle-raising and coal. Both of these industries proved to be significant in the development of needed transportation across this great country.”

– from the adapted article below



Cotton plant with ripe bolls ready for harvest

Suggested Reading and Assignments

- Read the article:
Cotton, Wheat, Cattle Raising, and Coal.
- Narrate about today’s reading using the appropriate notebook page.
- For each heading listed in today’s article, create a bullet point outline showing the main points made by the author. (A bullet point outline can be described as an informal outline using indentions or dashes behind which are listed the main points about a specific topic.) Use the website found on your **ArtiosHCS** curriculum website to explore the use of outlines.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Adapted for High School from the book:

Stories of Later American History

by Wilbur F. Gordy

Cotton, Wheat, Cattle Raising, and Coal

COTTON

Thus far we have been considering mainly the people engaged in the great struggles through which the world passed during the nineteenth century. But while only a small fraction of the people, as a rule, take an active and prominent part in the stirring events of history, many more work hard and faithfully to furnish all with food, clothing, and other things needful for everyday living. What these many laborers accomplish in the fields of industry, therefore, has a most important bearing upon the life and work of people, leaders and followers alike, in other fields of action. With this thought in mind, let us take a brief glance at a few of America's great industries.

First, go with me in thought to the South, where the cotton, from which Americans make much of their clothing, is raised. Owing to the favorable climate of the Southern states, it being warm and moist, the United States produces more cotton—and cotton of a better quality—than any other country in the world.

No crop, it is claimed by some, is as lovely while it is growing as cotton. The plants are low, with dark green leaves, while the flowers, which are yellow at first, changing by degrees to white, and then to deep pink. The cotton fields look like great flower gardens.

As the blossoms die, they are replaced by the young bolls, or pods, which contain the seeds. From the seeds grow long vegetable hairs, which form white locks in the pods. These fibers are the cotton. When the pods become ripe and open, the cotton bursts out and covers the seeds with a puff of soft, white down.

The height of the picking season is in October. As no satisfactory machine for picking cotton had been invented by the time period we are studying, it was usually done by hand. Lines of pickers passed between the rows, gathering the down and crowding it into wide-mouthed sacks hanging from their shoulders or waists. At the ends of the rows stood great baskets, into which the sacks were emptied, and then the cotton was loaded into wagons which carried it to the gin house.

If damp, the cotton was dried in the sun. The saw-teeth of the cotton gin separated the cotton fiber

from the seeds. Then the cotton was pressed down by machine presses and packed into bales, each usually containing five hundred pounds, after which it was sent to the factory.



Gossypium herbaceum, Malvaceae, Levant Cotton, flower; Botanical Garden KIT, Karlsruhe, Germany. The fresh, inner rootbark is used in homeopathy as a remedy called *Gossypium herbaceum*.

Various processes were employed to free the cotton from dirt and to loosen the lumps. Once it was clean, it was rolled out into thin sheets and taken to the carding machine. This, with other machines, prepared the cotton to be spun into yarn, which was wound off on large reels. The yarn was then ready to be either twisted into thread or woven into cloth on the great looms of the textile mills.

At the time of this writing (1915) the United States produces an average of eleven million bales of cotton every year, and this is nearly sixty-seven per cent of the production of the whole world. Cotton is now the second crop in the United States, the first being corn.

WHEAT

Wheat, the foundation of much of the world's food, is extensively cultivated. There are a great many varieties of this staple grain, the two main kinds found in the United States being the large-kernel winter wheat, grown in the East, and the hard spring wheat, the best for flour-making, which is grown in the West.

Minnesota was the largest wheat-producing state during the post-war period. The farms in this region are very level, and also highly productive. The big "bonanza" farms, as they were called, ranged in size from two thousand to ten thousand acres. Some of these are still so large today that even on level

ground one cannot look entirely across them—so large, indeed, that laborers working at opposite ends do not see one another for months at a time.

During the planting and harvesting seasons of the late nineteenth and early twentieth centuries, migratory laborers came from all over the country. They were housed and fed on the farms. The farms were divided into sections, and each section had its own lodging house, dining hall, barns, and so on. Even then, lunch was carried to the workers in the field, because they were often a mile or two from the dining hall. The height of the wheat harvest season is at the end of July.



Green wheat a month before harvest

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In the autumn, after the wheat had been harvested, the straw was burned, and the land plowed. In the following April when the soil was dry enough to harrow, the seed kernels, after being carefully selected and thoroughly cleaned, were planted. For the harvesting, a great deal of new machinery was purchased every year. One of these huge machines could cut and stack in one day the grain from a hundred acres of land. Then the grain was threshed at once in the field before the rain could do it harm.

Through the spout of the thresher the grain fell into a wagon, which carried it to the grain *elevator*, or building where machines lifted the grain into tanks for storage. Here it remained until it was released and loaded automatically into train cars, which took it to the great elevator centers. The wheat was not touched by hands from the time it passed into the thresher until it reached private kitchens in the form of flour.

The great elevator centers were Duluth, St. Paul, Minneapolis, Chicago, and Buffalo. Some elevators in these centers could store as much as a million or more bushels each. They were built of steel and equipped with steam power or electricity. The wheat

was taken from ships or train cars, carried up into the elevator, and deposited in various bins or tanks, according to its grade. On the opposite side of the elevator the wheat was later reloaded into train cars or canal boats.

In 1914 the United States produced nine hundred and thirty million bushels, or between one-fourth and one-fifth of all the wheat produced in the world.

CATTLE RAISING

The next great American industry is that of cattle raising. To find the ranches we must travel a little farther west, perhaps to Kansas. A wide belt stretching westward from the one-hundredth meridian to the foothills of the Rocky Mountains is made up of arid land. It includes parts of Texas, Kansas, Nebraska, the Dakotas, Montana, Wyoming, and Colorado. Although the rainfall here is mostly too light to grow corn and wheat without irrigation, these dry plains have sufficient vegetation to support great herds of sheep and cattle, supplying Americans with a large part of their beef. Cattle by the hundred thousand once fed on these vast unfenced regions.



The Herd Quitter, by C.M. Russell (1897). While the West is defined by many cultures, the American cowboy is often seen as iconic of the region.

On the great ranches of this belt, there were two important round-ups of the cattle every year. Between these times they roamed free over vast areas of land. In the spring they were driven slowly toward a central point. Then the calves were branded, or marked by a hot iron, with the owner's special brand. These brands were registered and recognized by law. This was done in order that each owner may be certain of his own cattle. In July or August the cattle were rounded up again, and this time the mature and fatted animals were selected to be driven to the shipping station on the railroad and loaded on the cars.

At the stock-yards the cattle were unloaded and driven into pens. From there the fat steers and cows were sent directly to market. The lean ones went to farmers in the Midwest, who made a specialty of fattening them for market, doing it in a few weeks.

The journey to the stock-yards often required from four to seven days. Once in about thirty hours the cattle were released from the cars to be fed and watered. Then the journey began again.

In the year 1910 there were 96,658,000 cattle in the United States. This meant that there was one for every human being in the whole country. But the number of beef cattle decreased as the larger ranches where they grazed were divided into small farms.



Coal miners at a deep anthracite mine in Hazleton, PA in 1900

COAL AND STEEL

By means of these three industries—cotton, wheat, and cattle—Americans were provided with food and clothing. But besides these necessities, people must have fuel. We need it both for heat in our households and for running most of our engines in factories and on trains. America's chief fuel during these years was coal.

To see coal mining, western Pennsylvania is a good place for us to visit. Were you to enter a mine, you might easily imagine yourself in a different world. In descending the shaft, you suddenly become aware that you are cut off from beautiful sunlight and fresh air. You find that to supply these everyday benefits, which you have come to accept as commonplace, there are ventilating machines working to bring down the fresh air from above, and portable lamps which will not cause explosion to

supply light, and that, where there is water, provision has been made for drainage.

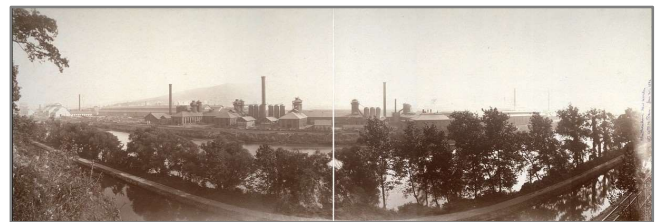
The walls of the mine, also, have to be strongly supported, in order that they may not fall and crush the workers or fill up the shaft. In deep-shaft mines, coal was carried to the surface by cages hoisted through the shaft. It was sorted and cleaned above ground.

One of the largest uses of coal is found in the factories where numerous articles of iron and steel are made. The world of industry depends so much upon iron that it is called the metal of civilization.

The iron and coal industries are closely related, for coal is used to make iron into steel. If you stay in Pennsylvania, you may catch a glimpse of the process by which iron is made usable.

As it comes from the mine it is not pure but is mixed with ore from which it must be separated. In iron mining regions you will see towering aloft here and there huge chimneys, or blast-furnaces, at times sending forth great clouds of black smoke and at times lighting the sky with the lurid glow of flames. In these big blast-furnaces, the iron ore and coal are piled in layers. Then a very hot fire is made, so hot that the iron melts and runs down into molds of sand, where it is collected. This process is called "smelting."

The iron thus obtained, though pure, is not hard enough for most purposes. It must be made into steel. Steel, you understand, is iron which has again been melted and combined with a small amount of carbon to harden it.



The Bethlehem Steel plant, photographed c.1896 by William H. Rau

At first this was an expensive process, but during the nineteenth century ways of making steel were discovered which greatly lowered its cost. As a result, steel took the place of iron in many ways, the most important being in the manufacture of rails for America's railroad systems. Since steel rails are stronger than iron, they make it possible to use larger locomotives and heavier trains and permit a much higher rate of speed and more bulky traffic. All this means, as you can easily see, cheaper and more rapid transportation, which is so important to all

industrial life. Steel has an extensive use, also, in the structure of bridges, of large buildings, of steamships and war vessels, as well as in the making of heating equipment, tools, household utensils, and hundreds of other articles which Americans constantly use in daily life. If you should write down all the uses for this metal which you can think of, you would be surprised at the length of your list.

These four great industries give us a little idea of how people make use of the products of the farm, the mine, and the factory in supplying human needs. Each fulfills its place, and we are dependent upon all. That means that we are all dependent upon one another. There would be little in life for anyone if he were to do without all that others have done for him.

Lesson Two

History Overview and Assignments Frontier Settlement in the American West

THE RAILROADS truly served to open the American West to even the common man, and to the exploitation of the region's resources. Great expanses of land for cattle grazing, along with passage of the Homestead Act of 1862, encouraged many Americans to move west. What these settlers found was a very different type of land on which to build a ranch or farm. Challenges with irrigation and arid climates were met with determination and ingenuity.



Norwegian settlers in 1898 North Dakota
in front of their homestead, a sod hut

Key People, Places, and Events

James J. Hill
Homestead Act of 1862

Suggested Reading and Assignments

- Read the article: *The Development of the Great West, Part One*.
- Narrate about today's reading using the appropriate notebook page. Be sure to include key people, events, and dates within the narration.
- For each heading listed in today's article, create a bullet point outline showing the main points made by the author. (A bullet point outline can be described as an informal outline using indentions or dashes behind which are listed the main points about a specific topic.) Use the website found on your **ArtiosHCS** curriculum website to explore the use of outlines.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Adapted for High School from the book:
History of the United States
by Charles A. Beard and Mary Beard

The Development of the Great West, Part One

At the close of the Civil War, Kansas and Texas were sentinel states on the middle border. Beyond

the Rockies, California, Oregon, and Nevada stood guard, the last of them having been admitted just to

furnish another vote for the Fifteenth Amendment abolishing slavery. Between the near and far frontiers lay a vast reach of plain, desert, plateau, and mountain, almost wholly undeveloped. A broad domain, extending from Canada to Mexico and embracing the regions now consisting of Washington, Idaho, Wyoming, Montana, Utah, Arizona, New Mexico, the Dakotas, and Oklahoma, this area at this time had fewer than half a million inhabitants. It was laid out into territories, each administered under a governor appointed by the President and Senate and, as soon as it had the requisite number of inhabitants, a legislature elected by the voters. No railway line stretched across the desert. St. Joseph on the Missouri was the **terminus** of the eastern lines. It required twenty-five days for a passenger to make the overland journey to California by the stagecoach system established in 1858, and more than ten days for the swift pony express, organized in 1860, to carry a letter to San Francisco. Native Americans still roamed the plain and desert, and more than one powerful tribe disputed the white man's title to the soil.

THE RAILWAYS AS TRAIL BLAZERS

Opening Railways to the Pacific

A decade before the Civil War, the importance of rail connection between the east and the Pacific Coast had been recognized. Pressure had already been brought to bear on Congress to authorize the construction of a line and to grant land and money for its aid. Both the Democrats and Republicans approved the idea, but it was involved in the slavery controversy. Indeed, it was submerged in it. Southern statesmen wanted connections between the Gulf and the Pacific through Texas, while Northerners held out for a central route.

The North had its way during the war. Congress, by legislation initiated in 1862, provided for the immediate organization of companies to build a line from the Missouri River to California and made grants of land and loans of money to aid in the enterprise. The western end, the Central Pacific, was laid out under the supervision of Leland Stanford. It was heavily financed by the Mormons of Utah and also by the state government, the ranchmen, miners, and businessmen of California; and it was built principally by Chinese labor. The eastern end, the Union Pacific, starting at Omaha, was constructed mainly by veterans of the Civil War and immigrants from Ireland and Germany. In 1869 the two

companies met near Ogden in Utah and the driving of the last spike, uniting the Atlantic and the Pacific, was the occasion of a great celebration.

Other lines to the Pacific were projected at the same time; but the Panic of 1873 checked railway enterprise for a while. With the revival of prosperity at the end of that decade, construction was renewed with vigor and the year 1883 marked a series of railway triumphs. By February trains were running from New Orleans through Houston, San Antonio, and Yuma to San Francisco, in result of a union of the Texas Pacific with the Southern Pacific and its subsidiary corporations. In September, the last spike was driven in the Northern Pacific at Helena, Montana. Lake Superior was connected with Puget Sound. The waters explored by Joliet and Marquette were joined to the waters plowed by Sir Francis Drake while he was searching for a route around the world. That same year a third line was opened to the Pacific by way of the Atchison, Topeka, and Santa Fe, making connections through Albuquerque and Needles with San Francisco. The fondest hopes of railway promoters seemed to be realized.

Western Railways Precede Settlement

In the Old World and on America's Atlantic seaboard, railways followed population and markets. In the far West, railways usually preceded the people. Railway builders planned cities on paper before they laid tracks connecting them. They sent "missionaries" to spread the gospel of "western opportunity" to people in the Midwest, in the eastern cities, and in southern states. Then they carried their enthusiastic converts, bag and baggage, in long trains to the distant Dakotas and still farther afield. So, the development of the far West was not left to the tedious processes of time. It was pushed by men of imagination—adventurers who made a romance of money-making and who had dreams of empire unequalled by many kings of the past.



Underwood, ND, a town on the prairie

These empire builders bought railway lands in huge tracts; they got more from the government; they overcame every obstacle of canyon, mountain, and stream with the aid of science; they built cities according to the plans made by the engineers. Having the towns ready and railway and steamboat connections formed with the rest of the world, they carried out the people to use the railways, the steamships, the houses, and the land. It was in this way that “the frontier **speculator** paved the way for the frontier agriculturalist, who had to be near a market before he could farm.” The spirit of this imaginative enterprise, which laid out railways and towns in advance of the people, is seen in an advertisement of that day: “This extension will run 42 miles from York, northeast through the Island Lake country, and will have five good North Dakota towns. The stations on the line will be well equipped with elevators and will be constructed and ready for operation at the commencement of the grain season. Prospective merchants have been active in securing desirable locations at the different towns on the line. There are still opportunities for hotels, general merchandise, hardware, furniture, and drug stores, etc.”

Among the railway promoters and builders in the west, **James J. Hill** of the Great Northern and Allied Lines, was one of the most forceful figures. He knew that tracks and trains were useless without passengers, and freight without a population of farmers and town dwellers to purchase it. He therefore organized publicity in the Virginias, Iowa, Ohio, Indiana, Illinois, Wisconsin, and Nebraska especially. He sent out agents to tell the story of western opportunity in this vein:

“You see your children come out of school with no chance to get farms of their own because the cost of land in your older part of the country is so high that you can’t afford to buy land to start your sons out in life around you. They have to go to the cities to make a living or become laborers in the mills or hire out as farm hands. There is no future for them there. If you are doing well where you are and can safeguard the future of your children and see them prosper around you, don’t leave there. But if you want independence, if you are renting your land, if the money-lender is carrying you along and you are running behind year after year, you can do no worse by moving . . . You farmers talk of free trade and protection and what this or that political party will do for you. Why don’t you vote a homestead for yourself? That is the only thing Uncle Sam will ever

give you. Jim Hill hasn’t an acre of land to sell you. We are not in the real estate business. We don’t want you to go out west and make a failure of it because the rates at which we haul you and your goods make the first transaction a loss. . . We must have landless men for a manless land.”

Unlike the steamship companies stimulating immigration to get the fares, Hill was seeking permanent settlers who would produce, manufacture, and use the railways as the means of exchange. Consequently, he fixed low rates and let his passengers take a good deal of livestock and household furniture free. By doing this he made an appeal that was answered by eager families.

In 1894 the vanguard of home seekers left Indiana in fourteen passenger coaches, filled with men, women, and children, and forty-eight freight cars carrying their household goods and livestock. In the ten years that followed, 100,000 people from the Midwest and the South, responding to his call, went to the western country where they brought eight million acres of prairie land under cultivation.

When Hill got his people on the land, he took an interest in everything that increased the productivity of their labor. Was the output of food for his freight cars limited by bad drainage on the farms? Hill then interested himself in practical ways of ditching and tilling. Were farmers hampered in hauling their goods to his trains by bad roads? In that case, he urged upon the states the improvement of highways. Did the traffic slacken because the food shipped was not of the best quality? Then livestock must be improved, and scientific farming promoted. Did the farmers need credit? Banks must be established close at hand to advance it. In all conferences on scientific farm management, conservation of natural resources, banking, and credit in relation to agriculture and industry, Hill was an active participant. His was the long vision, seeing in conservation and permanent improvements the foundation of prosperity for the railways and the people.

Indeed, he neglected no opportunity to increase the traffic on the lines. He wanted no empty cars running in either direction and no wheat stored in warehouses for lack of markets. So, he looked to the Orient as well as to Europe as an outlet for the surplus of the farms. He sent agents to China and Japan to discover what American goods and produce those countries would consume and what manufactures they had to offer to Americans in exchange.

To open the Pacific trade, he bought two ocean monsters, the *Minnesota* and the *Dakota*, thus preparing for emergencies in the west as well as in the east. When some Japanese came to the United States on their way to Europe to buy steel rails, Hill showed them how easy it was for them to make their purchase in America instead, and to ship by way of American railways and American vessels. So, the railway builder and promoter, who helped to break the untouched soil of the prairies, lived through the pioneer **epoch** and into the age of great finance. Before he died, he saw the wheat fields of North Dakota linked with the spinning jennies of Manchester and the docks of Yokohama.

THE EVOLUTION OF GRAZING AND AGRICULTURE

The Removal of the Native Americans

Compared with the frontier of New England in colonial days or that of Kentucky later, the advancing lines of home builders in the far West had less difficulty with warlike Native Americans. Attacks were made on the railway construction gangs, General Custer had his fatal battle with the Sioux in 1876, and there were minor brushes, but they were all of relatively slight consequence.

The former practice of treating the indigenous family groups and confederacies as independent nations was abandoned in 1871, and most Native Americans were concentrated on reservations, where they were mainly supported by the government. The supervision of their affairs was vested in a board of commissioners created in 1869 who were instructed to treat them as wards of the nation—a trust which sadly was often betrayed.

A further step in Native American policy was taken in 1887 when provision was made for issuing land grants to individual tribe members, thus permitting them to become citizens and settle down among their white neighbors as farmers or cattle raisers. The disappearance of the bison (known as the American buffalo), the main food supply of the **nomadic** tribespeople, had made them more willing to surrender the freedom of the hunter for the routine of the reservation, ranch, or wheat field.

The Cowboy and the Cattle Range

Between the frontier of farms and the mountains were plains and semi-arid regions in vast reaches suitable for grazing. As soon as the railways were open into the Missouri Valley, affording an outlet for

stock, there sprang up in the West cattle and sheep raising on an immense scale. The famed American cowboy was the hero in this scene. Great herds of cattle were bred in Texas; with the advancing spring and summer seasons, they were driven northward across the plains and over the bison trails. In a single year, 1884, it is estimated that nearly one million head of cattle were moved out of Texas to the North by four thousand cowboys, supplied with 30,000 horses and ponies.



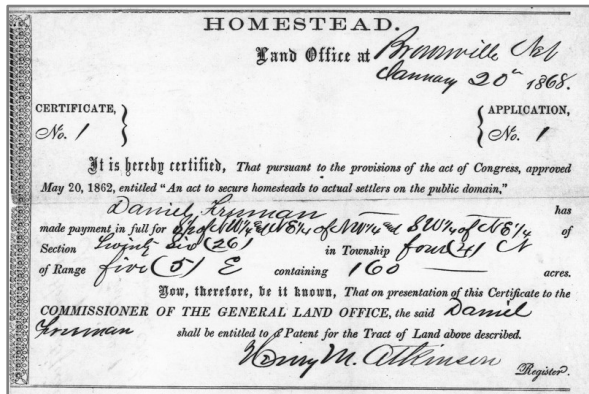
The Cow Boy, by C.H. Grabill, photographer, Sturgis, Dakota Territory (c.1888)

During the two decades from 1870 to 1890 both the cattle men and the sheep raisers had almost free run of the plains, using public lands without paying for the privilege and waging war on one another over the possession of ranges. At length, however, both had to go, as the homesteaders and land companies came and fenced in the plain and desert with endless lines of barbed wire.

Already in 1893, a writer familiar with the frontier lamented the passing of the picturesque days:

“The unique position of the cowboys among the Americans is jeopardized in a thousand ways. Towns are growing up on their pasture lands; irrigation schemes of a dozen sorts threaten to turn bunch-grass scenery into farm-land views; farmers are preempting valleys and the sides of waterways; and the day is not far distant when stock-raising must be done mainly in small herds, with winter corrals, and then the cowboy’s days will end. Even now his condition disappoints those who knew him only half a dozen years ago. His breed seems to have deteriorated, and his ranks are filling with men who work for wages rather than for the love of the free life and bold companionship that once tempted men into that calling. Splendid Cheyenne saddles are less and less numerous in the outfits; the distinctive hat that

made its way up from Mexico may or may not be worn; all the civil authorities in nearly all towns in the grazing country forbid the wearing of side arms; nobody shoots up these towns anymore. The fact is the old simon-pure cowboy days are gone already.”



Certificate of the first homestead according to the Homestead Act, given to Daniel Freeman in Beatrice, Nebraska

Settlement Under the Homestead Act of 1862

Two factors gave a special **stimulus** to the rapid settlement of western lands which swept away the Native Americans and the cattle rangers. The first was the policy of the railway companies of selling large blocks of land received from the government at low prices to induce immigration. The second was the operation of the **Homestead Act of 1862**. This measure practically closed the long controversy over the disposition of the public domain that was suitable for agriculture. It provided for granting, without any cost save a small registration fee, public lands in lots of 160 (one-quarter of a square mile) each to citizens and aliens who declared their intention of becoming citizens. Any adult could apply who had not taken up arms against the government, and freed slaves were encouraged to participate. The one important condition attached was that the settler was required to occupy the farm for five years before his title was finally confirmed. Even this **stipulation** was waived in the case of the Civil War veterans who were allowed to count their term of military service as a part of the five years' occupancy required.

As the soldiers of the Revolutionary and Mexican wars had advanced in great numbers to the frontier in earlier days, so now veterans led in the settlement of the middle border. Along with them went thousands of German, Irish, and Scandinavian immigrants, fresh from the Old World. Between 1867 and 1874, 27,000,000 acres were staked out in

quarter-section farms. In twenty years (1860-80), the population of Nebraska leaped from 28,000 to almost half a million; Kansas from 100,000 to a million; Iowa from 600,000 to 1,600,000; and the Dakotas from 5000 to 140,000.

The Diversity of Western Agriculture

In soil, produce, management, and western agriculture the region presented many contrasts to that of the East and South. In the region of **arable** and watered lands the typical American unit—the small farm tilled by the owner—appeared as usual; but alongside these came many a huge domain owned by foreign or eastern companies and tilled by hired labor. Sometimes the great estate took the shape of the “bonanza farm” devoted mainly to wheat and corn and cultivated on a large scale by machinery. Once again it assumed the form of the cattle ranch embracing tens of thousands of acres. Once again it was a vast holding of diversified interest, such as the Santa Anita ranch near Los Angeles, a domain of 60,000 acres “cultivated in a glorious sweep of vineyards and orange and olive orchards, rich sheep and cattle pastures and horse ranches, their life and customs handed down from the Spanish owners of the various ranches which were swept into one estate.”

Irrigation

In one respect agriculture in the far West was unique. In a large area spreading through eight states—Montana, Idaho, Wyoming, Utah, Colorado, Nevada, Arizona, New Mexico, and parts of adjoining states—the rainfall was so slight that the ordinary crops to which the American farmer was accustomed could not be grown at all. The Mormons were the first white people to encounter the aridity, and they were baffled at first; but they studied it and mastered it by magnificent irrigation systems. As other settlers poured into the West the problem of the desert was attacked with a will, some of them replying to the commiseration of Eastern farmers by saying that it was easier to scoop out an irrigation ditch than to cut forests and wrestle with stumps and stones.

Private companies bought immense areas at low prices, built irrigation works, and disposed of their lands in small plots. Some ranchers with an instinct for finding water, like that of the miner for metal, sank wells into the dry sand and were rewarded with gushers that “soused the thirsty desert and turned its good-for-nothing sand into good-for-anything loam.”

The federal government came to the aid of the arid regions in 1894 by granting lands to the states to be used for irrigation purposes. In this work Wyoming took the lead with a law which induced capitalists to invest in irrigation and at the same time provided for the sale of the redeemed lands to actual settlers. Finally in 1902 the federal government by its liberal Reclamation Act added its strength to that of individuals, companies, and states in conquering “arid America.”

The effect of irrigation wherever introduced was amazing. Stretches of sand and sagebrush gave way to fertile fields bearing crops of wheat, corn, fruits, vegetables, and grass. Huge ranches grazed by browsing sheep were broken up into small plots. The cowboy and ranchman vanished. In their place rose the prosperous community—a community unlike the township of Iowa or the industrial center of the East. Its intensive tillage left little room for hired labor. Its small holdings drew families together in village life

rather than dispersing them on the lonely plain. Often the development of waterpower in connection with irrigation afforded electricity for labor-saving devices and lifted many a burden that in other days fell heavily upon the shoulders of the farmer and his family.



Emigrants Crossing the Plains shows settlers crossing the Great Plains. By F.O.C. Darley and engraved by H.B. Hall (1872)

Lesson Three

History Overview and Assignments Mining, Timber, Grain, and Expansion

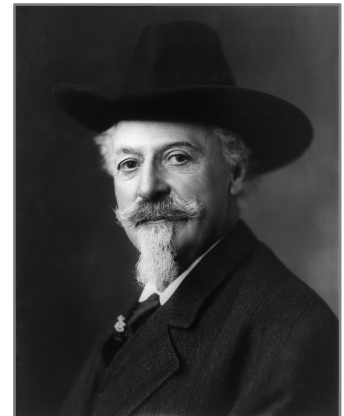
MINERAL AND TIMBER resources were abundant in the West, leading to rapid population growth and business development. Foreign trade was expanded, and the American market grew, with the growing of grain quickly supplanting that of cotton.



The Great West

Key People, Places, and Events

Joel Palmer
Horace Tabor
Leland Stanford
William F. “Buffalo Bill” Cody



“Buffalo Bill” Cody

Suggested Reading and Assignments

- Read the article: *The Development of the Great West, Part Two*.
- Narrate about today's reading using the appropriate notebook page. Be sure to include key people, events, and dates within the narration.
- For each heading listed in today's article, create a bullet point outline showing the main points made by the author. (A bullet point outline can be described as an informal outline using indentions or dashes behind which are listed the main points about a specific topic.) Use the website found on your **ArtiosHCS** curriculum website to explore the use of outlines.
- Do additional research on one of the following: **General Joel Palmer**, **Horace Tabor**, **Horace Greeley**, or **William F. "Buffalo Bill" Cody**. Be prepared to share your research.
- Be sure to visit your **HCS Haiku Class pages** for additional resources.

Adapted for High School from the book:
History of the United States
by Charles A. Beard and Mary Beard

The Development of the Great West, Part Two

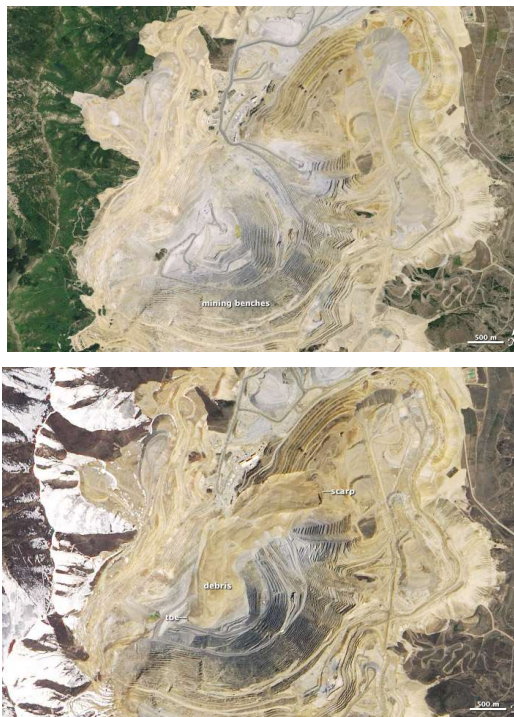
Mineral Resources

In another important particular the far West differed from the Mississippi Valley states. This was in the predominance of mining over agriculture throughout this vast section. Indeed, it was the minerals rather than the land that attracted the pioneers who first opened the country. The discovery of gold in California in 1848 was the signal for the great rush of prospectors, miners, and promoters who explored the valleys, climbed the hills, washed the sands, and dug up the soil in their feverish search for gold, silver, copper, coal, and other minerals.

In Nevada and Montana, the development of mineral resources went on all during the Civil War. Alder Gulch became Virginia City in 1863; Last Chance Gulch was named Helena in 1864; and Confederate Gulch was christened Diamond City in 1865. At Butte, the miners began operations in 1864 and within five years had washed out eight million dollars' worth of gold. Under the gold they found silver; under silver they found copper.

Even at the end of the nineteenth century, after agriculture was well advanced and stock and sheep raising introduced on a large scale, minerals continued to be the chief source of wealth in a number of states. This was revealed by the figures for 1910. The gold, silver, iron, and copper of Colorado were worth more than the wheat, corn, and oats combined; the copper of Montana sold for more than all the cereals and four times the price of the wheat. The interest of Nevada was also mainly mining, the receipts from the mineral output being \$43,000,000 or more than one-half the national debt of Hamilton's day. The yield of the mines of Utah was worth four or five times the wheat crop; the coal of Wyoming brought twice as much as the great wool

clip (a wool clip being the total amount of wool shorn during one season from the sheep of a particular region); the minerals of Arizona were totaled at \$43,000,000 as against a wool clip reckoned at \$1,200,000; while in Idaho alone of this group of states did the wheat crop exceed in value the output of the mines.



Bingham Canyon Mine satellite images before (above, July 20, 2011) and after (below, May 2, 2013) a landslide on April 20, 2013. NASA Earth Observatory image by Jesse Allen and Robert Simmon

Timber Resources

The forests of the great West, unlike those of the Ohio Valley, proved a boon to the pioneers rather than a foe to be attacked. In Ohio and Indiana, for

example, the frontier line of farmers had to cut, roll, and burn thousands of trees before they could put out a crop of any size. Beyond the Mississippi, however, there were all ready for the breaking plow great reaches of almost treeless prairie, where every stick of timber was precious. In the other parts, often rough and mountainous, where primeval forests of the finest woods stood, the railroads made good use of the timber. They consumed acres of forests in making ties, bridge timbers, and telegraph poles, and they laid a heavy tribute upon the forests for their annual upkeep. The surplus trees, such as had burdened the pioneers of the Northwest Territory a hundred years before, they carried off to markets on the East and West coasts.

Western Industries

The peculiar conditions of the far West stimulated a rise of industries that took place more rapidly than is usual in new country. The mining activities which in many sections preceded agriculture called for sawmills to furnish timber for the mines and smelters to reduce and refine ores. The ranches supplied sheep and cattle for the packing houses of Kansas City as well as Chicago. The waters of the Northwest afforded salmon for 4000 cases in 1866 and for 1,400,000 cases in 1916. The fruits and vegetables of California brought into existence innumerable canneries. The lumber industry, starting with crude sawmills to furnish rough timbers for railways and mines, ended in specialized factories for paper, boxes, and furniture. As the railways preceded settlement and furnished a ready outlet for local manufactures, so they encouraged the early establishment of varied industries, thus creating a state of affairs quite unlike that which existed in the Ohio Valley in the early days before the opening of the Erie Canal.

Social Effects of Economic Activities

In many respects the social life of the far West also differed from that of the Ohio Valley. The treeless prairies, though open to homesteads, favored the great estate tilled in part by tenant labor and in part by migratory seasonal labor, summoned from all sections of the country for the harvests. The mineral resources created hundreds of huge fortunes which made the accumulations of eastern mercantile families look trivial by comparison. Other millionaires won their fortunes in the railway business and still more from the cattle and sheep ranges. In many sections the “cattle king,” as he was

called, was as dominant as the planter had been in the old South. Everywhere in the grazing country he was a conspicuous and important person. He “sometimes invested money in banks, in railroad stocks, or in city property . . . He had his rating in the commercial reviews and could hobnob with bankers, railroad presidents, and metropolitan merchants . . . He attended party caucuses and conventions, ran for the state legislature, and sometimes defeated a lawyer or metropolitan ‘business man’ in the race for a seat in Congress. In proportion to their numbers, the ranchers . . . have constituted a highly impressive class.”

Although many of the early capitalists of the great West, especially from Nevada, spent their money principally in the East, others took leadership in promoting the sections in which they had made their fortunes. A railroad pioneer, General **Joel Palmer**, built his home at Colorado Springs, founded the town, and encouraged local improvements. Denver owed its first impressive buildings to the civic patriotism of **Horace Tabor**, a wealthy mine owner. **Leland Stanford** paid his tribute to California in the endowment of a large university. Colonel **William F. Cody**, better known as “Buffalo Bill,” started his career by building a “boom town” that collapsed, and he made a large sum of money supplying bison meat to construction hands (hence his popular name). By his famous Wild West Show, he increased it to a fortune, which he devoted mainly to the promotion of a western reclamation scheme.

While the far West was developing this vigorous, aggressive leadership in business, a considerable industrial population was springing up. Even the cattle ranges and hundreds of farms were conducted like factories in that they were managed through overseers who hired plowmen, harvesters, and cattlemen at regular wages. At the same time there appeared other peculiar features which made a lasting impression on western economic life. Mining, lumbering, and fruit growing, for instance, employed thousands of workers during the rush months and turned them out at other times. The inevitable result was an army of migratory laborers wandering from camp to camp, from town to town, and from ranch to ranch, without fixed homes or established habits of life. From this extraordinary condition there issued many a long and lawless conflict between capital and labor, giving a distinct color to the labor movement in whole sections of the mountain and coastal states.

THE ADMISSION OF NEW STATES

The Spirit of Self-Government

The instinct for self-government was strong in the western communities. In the very beginning, it led to the organization of volunteer committees, known as *vigilantes*, to suppress crime and punish criminals. As soon as enough people were settled permanently in a region, they took care to form a more stable kind of government. An illustration of this process is found in the Oregon compact made by the pioneers in 1843, the spirit of which is reflected in an editorial in an old copy of the Rocky Mountain News: "We claim that any body or community of American citizens which from any cause or under any circumstances is cut off from or from isolation is so situated as not to be under any active and protecting branch of the central government, has a right, if on American soil, to frame a government and enact such laws and regulations as may be necessary for their own safety, protection, and happiness, always with the condition precedent, that they shall, at the earliest moment when the central government shall extend an effective organization and laws over them, give it their unqualified support and obedience."

People who turned so naturally to the organization of local administration were equally eager for admission to the Union as soon as any shadow of a claim to statehood could be advanced. As long as a region was merely one of the territories of the United States, the appointment of the governor and other officers was controlled by politics at Washington. Moreover, the disposition of land, mineral rights, forests, and waterpower was also in the hands of national leaders. Thus, practical considerations were united with the spirit of independence in the quest for local autonomy.

Nebraska and Colorado

Two states, Nebraska and Colorado, had little difficulty in securing admission to the Union. The first, Nebraska, had been organized as a territory by the famous Kansas-Nebraska Bill which did so much to precipitate the Civil War. Lying to the north of Kansas, which had been admitted in 1861, it escaped the invasion of slave owners from Missouri and was settled mainly by farmers from the North. Though it claimed a population of only 67,000, it was regarded with kindly interest by the Republican Congress at Washington and, reduced to its present boundaries, it received the coveted statehood in 1867.

This was hardly accomplished before the people of Colorado to the southwest began to make known their demands. They had been organized under territorial government in 1861 when they numbered only a handful; but within ten years the nature of their affairs had completely changed. The silver and gold deposits of the Leadville and Cripple Creek regions had attracted an army of miners and prospectors. The city of Denver, founded in 1858 and named after the governor of Kansas whence came many of the early settlers, had grown from a straggling camp of log huts into a prosperous center of trade. By 1875 it was reckoned that the population of the territory was not less than one hundred thousand; the following year Congress, yielding to the popular appeal, made Colorado a member of the American Union.

Six New States—1889-1890

For many years there was a deadlock in Congress over the admission of new states. The spell was broken in 1889 under the leadership of the Dakotas. For a long time, the Dakota Territory, organized in 1861, had been looked upon as the home of the powerful Sioux, whose enormous reservation blocked the advance of the frontier. The discovery of gold in the Black Hills, however, marked their doom. Even before Congress could open their lands to prospectors, pioneers were swarming over the country. Farmers from adjoining Minnesota and the eastern states, Scandinavians, Germans, and Canadians, came in swelling waves to occupy the fertile Dakota lands, now famous even as far away as the *fjords* of Norway. Seldom had the plow of man cut through richer soil than was found in the bottoms of the Red River Valley, and it became all the more precious when the opening of the Northern Pacific in 1883 afforded a means of transportation east and west. The population, which had numbered 135,000 in 1880, passed the half million mark before ten years had elapsed.

Remembering that Nebraska had been admitted with only 67,000 inhabitants, the Dakotans could not see why they should be kept under federal control. At the same time Washington, far away on the Pacific Coast, Montana, Idaho, and Wyoming, boasting of their populations and their riches, put in their own eloquent pleas. But the members of Congress were busy with politics. The Democrats saw no good reason for admitting new Republican states until after their defeat in 1888. Near the end of their term the next year they opened the door for

North and South Dakota, Washington, and Montana. In 1890, a Republican Congress brought Idaho and Wyoming into the Union, the latter with women's suffrage, which had been granted there twenty-one years before.



Zion National Park is located in southwestern Utah, United States. View from Canyon Overlook.

Utah

Although Utah had long presented all the elements of a well-settled and industrious community, its admission to the Union was delayed on account of popular hostility to the Mormon practice of polygamy. The custom, it is true, had been prohibited by act of Congress in 1862; but the law had been systematically evaded. In 1882 Congress made another and more effective effort to stamp out polygamy. Five years later it even went so far as to authorize the confiscation of the property of the Mormon Church in case the practice of plural marriages was not stopped. Meanwhile, the non-Mormon population was steadily increasing, and the leaders in the Church became convinced that the battle against the sentiment of the country was futile. At last, in 1896 Utah was admitted as a state under a constitution which forbade plural marriages absolutely and forever. The famous editor and congressman Horace Greeley, who visited Utah in 1859, had prophesied that the Pacific Railroad would work a revolution in the land of Brigham Young. His prophecy had come true.

Rounding Out the Continent

Three more territories now remained out of the Union. Oklahoma, long a Native American reservation, was opened for settlement to white men in 1889. The rush upon the fertile lands of this region, the last in the history of America, was marked by all the frenzy of the final, desperate chance. At a signal from a bugle, an army of men with families in

wagons, along with men and women on horseback and on foot, burst into the territory. During the first night, a city of tents was raised at Guthrie and Oklahoma City. Within ten days, wooden houses rose on the plains. In a single year there were schools, churches, business blocks, and newspapers. Within fifteen years there was a population of more than half a million. To the west, Arizona with a population of about 125,000 and New Mexico with 200,000 inhabitants joined Oklahoma in asking for statehood. Congress, then Republican, looked with reluctance upon the addition of more Democratic states; but in 1907 it was literally compelled by public sentiment and a sense of justice to admit Oklahoma. In 1910 the House of Representatives went to the Democrats, and within two years Arizona and New Mexico were "under the roof." In this way the continental domain was rounded out.

THE INFLUENCE OF THE FAR WEST ON NATIONAL LIFE

The Close of the Frontier

When Horace Greeley made his trip west in 1859, here is how he recorded the progress of civilization in his journal:

May 12th, Chicago [Illinois]—Chocolate and morning journals last seen on the hotel breakfast table.

23rd, Leavenworth [Kansas]—Room bells and bath tubs make their final appearance.

26th, Manhattan [Kansas]—Potatoes and eggs last recognized among the blessings that 'brighten as they take their flight.'

27th, Junction City [Kansas]—Last visitation of a boot-black, with dissolving views of a board bedroom. Beds bid us good-by.

Within thirty years travelers were riding across that country in Pullman cars and enjoying at the hotels all the comforts of a standardized civilization. The "wild west" was soon gone, and with it that frontier of pioneers and settlers who had long given such a bent and tone to American life, and who had "poured in upon the floor of Congress" a long line of "backwoods politicians," as they were scornfully styled.

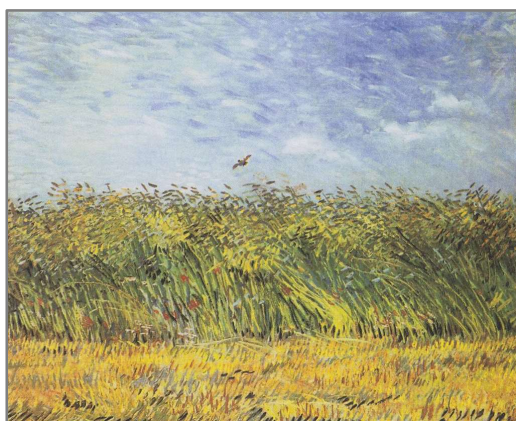
Free Land and Eastern Labor

It was not only the picturesque features of the

frontier that were gone. Of far more consequence was the disappearance of free lands, with all that meant for American labor. For more than a hundred years, any man of even moderate means had been able to secure a homestead of his own and an independent livelihood. For a hundred years, America had been able to supply farms to as many immigrants as cared to till the soil. Every new pair of strong arms meant more farms and more wealth. Workmen in eastern factories, mines, or mills who did not like their hours, wages, or conditions of labor could readily find an outlet to the land. Now all that was over. By about 1890, most of the desirable land available under the Homestead Act had disappeared. American industrial workers confronted a new situation.

Grain and Other Farm Products Supplant King Cotton

In the meantime, a revolution was taking place in agriculture. Until 1860 the chief staples sold by America were cotton and tobacco. With the advance of the frontier, corn and wheat supplanted them both in agrarian economy. The West became the granary of the East and of Western Europe. The scoop shovel once used to handle grain was superseded by the towering elevator, loading and unloading thousands of bushels every hour. The refrigerator car and ship made the packing industry as stable as the production of cotton or corn and gave an immense impetus to cattle raising and sheep farming. So, the meat of the American West took its place on the English dinner table by the side of bread baked from Dakotan wheat.



Wheat Field With Poppies and Lark,
by Vincent Van Gogh, Paris (1887)

Aid in American Economic Independence

The effects of this economic movement were manifold and striking. Billions of dollars' worth of

American grain, dairy produce, and meat were poured into European markets, where they paid off debts due to money lenders and acquired capital to develop American resources. Thus, they accelerated the progress of American financiers toward national independence. The country, which had timidly turned to the Old World for capital in Hamilton's day and had borrowed at high rates of interest in London in Lincoln's day, moved swiftly toward the time when it would be among the world's first bankers and money lenders itself. Every grain of wheat and corn pulled the balance down on the American side of the scale.

Eastern Agriculture Affected

In the East as well as abroad, the opening of the western granary produced momentous changes. The agricultural economy of that part of the country was altered in many respects. Whole sections of the poorest land went almost out of cultivation, the abandoned farms of the New England hills bearing solemn witness to the competing power of western wheat fields. Sheep and cattle raising, as well as wheat and corn production, suffered at least a relative decline. Thousands of farmers cultivating land of the lower grade were forced to go west or were driven to the margin of subsistence. Even the herds that supplied eastern cities with milk were fed upon grain brought halfway across the continent.

The Expansion of the American Market

Upon industry as well as agriculture, the opening of vast food-producing regions made changes in a thousand ways. The demand for farm machinery, clothing, boots, shoes, and other manufactures gave to American industries such a market as even Hamilton had never foreseen. Moreover, it helped to expand far into the Mississippi Valley the industrial area once confined to the northern seaboard states, and to transform the region of the Great Lakes into an industrial empire. Herein lies the explanation of the growth of midwestern cities after 1865.

Chicago, with its thirty-five railways, tapped every locality of the West and South. To the railways were added the water routes of the Lakes, thus creating a strategic center for industries. Long foresight carried the McCormick reaper works to Chicago before 1860. From Troy, New York, went a large stove plant. That was followed by a shoe factory from Massachusetts. The packing industry rose as a matter of course at a point highly advantageous for cattle raisers and shippers and well connected with eastern markets.

To the opening of the far West also the Lake region was indebted for a large part of that water-borne traffic which made it “the Mediterranean basin of North America.” The produce of the West and the manufactures of the East poured through it in an endless stream. The swift growth of shipbuilding on the Great Lakes helped to compensate for the decline of the American marine on the high seas. In response to this stimulus, Detroit could boast that her shipwrights were able to turn out a ten-thousand-ton Leviathan for ore or grain about “as quickly as carpenters could put up an eight-room house.” Thus, the far West—the wilderness of Jefferson’s time—had taken the position formerly occupied by New England alone. It was supplying capital and manufactured goods for a vast agricultural empire west and south.

America on the Pacific

It has been said that the Mediterranean Sea was the center of ancient civilization; that modern civilization has developed on the shores of the Atlantic; and that the future belongs to the Pacific. At any rate, the sweep of the United States to the shores of the Pacific quickly exercised a powerful influence on world affairs, and it undoubtedly has a still greater significance for the future.

Very early regular traffic sprang up between the Pacific ports and the Hawaiian Islands, China, and Japan. Two years before the adjustment of the Oregon controversy with England, namely in 1844, the United States had established official and trading relations with China. Ten years later, four years after the admission of California to the Union, the barred door of Japan was forced open by Commodore Perry. The commerce which had long before developed between the Pacific ports and Hawaii, China, and Japan now flourished under official care. In 1865 a ship from Honolulu carried sugar, molasses, and fruits from Hawaii to the Oregon port of Astoria. The next year a vessel from Hong Kong brought rice, mats, and tea from China. An era of lucrative trade was opened. The annexation of Hawaii in 1898, the addition of the Philippines at the same time, and the participation of American troops in the suppression of the Boxer rebellion in Peking in 1900 were but signs and symbols of American power on the Pacific.

Conservation and the Land Problem

The disappearance of the frontier also brought new and serious problems to the governments of the states and the nation.

The people of the whole United States were suddenly forced to realize that there was a limit to the rich, new land to exploit and to the forests and minerals awaiting the ax and the pick. Then arose in America the questions which had long perplexed the countries of the Old World regarding the scientific use of the soils and conservation of natural resources. Hitherto the government had followed the easy path of giving away arable land and selling forest and mineral lands at low prices. Now it had to face far more difficult and complex problems. It also had to consider questions of land tenure again, especially if the ideal of a nation of home owning farmers was to be maintained. While there was plenty of land for every man or woman who wanted a home on the soil, it made little difference whether single landlords or companies got possession of millions of acres, if a hundred men in one western river valley owned 17,000,000 acres; but when the good land for small homesteads was all gone, then was raised the real issue.

At the opening of the twentieth century the nation, which a hundred years before had land and natural resources apparently without limit, was compelled to enact law after law conserving its forests and minerals. Then it was that the great state of California, on the very border of the continent, felt constrained to enact a land settlement measure providing government assistance in an effort to break up large holdings into small lots and to make it easy for actual settlers to acquire small farms. America was passing into a new epoch.



Map showing the population distribution among the 45 states and 4 territories of the mainland United States, and the extent of the frontier line by 1900 (1914)

The Artios Home Companion Series

Unit 8: America's Gilded Age

Teacher Overview

ADVANCES IN TRANSPORTATION, farming, and business sped America's transformation from an early nineteenth century land of open territories to a turn-of-the-century nation of big business, ready to take its place competing and soon leading in the world's economy and politics. Along with these rapid changes came numerous challenges, which brought about new divisions and strife, along with scientific advancements that provided the means to power tremendous improvements to industry and lifestyles.



The Bosses of the Senate (1889). Reformers like the cartoonist Joseph Keppler depicted the Senate as controlled by the giant moneybags, who represented the nation's financial trusts and monopolies.

Suggested Assignments

In this unit, students will:

- Complete three lessons in which they will learn about **domestic issues faced by the United States during the late nineteenth century, changes in party politics, and concurrent advances in the field of electricity**, journaling and answering discussion questions as they read.
- Define vocabulary words.
- Prepare a paper, presentation, or demonstration on an electrical invention or discovery.
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Idea

Scripture addresses government's responsibilities to the people—to uphold Biblical ethics, protect the people from enemies, and safeguard their God-given rights.

“Now obey my voice; I will give you advice, and God be with you! You shall represent the people before God and bring their cases to God, and you shall warn them about the statutes and the laws, and make them know the way in which they must walk and what they must do. Moreover, look for able men from all the people, men who fear God, who are trustworthy and hate a bribe, and place such men over the people as chiefs of thousands, of hundreds, of fifties, and of tens.”

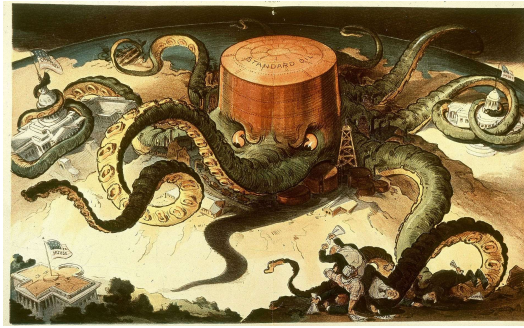
– Exodus 18:19-21

Those who were to camp before the tabernacle on the east, before the tent of meeting toward the sunrise, were Moses and Aaron and his sons, guarding the sanctuary itself, to protect the people of Israel. And any outsider who came near was to be put to death.

– Numbers 3:38

“The God of Israel has spoken; The Rock of Israel has said to me: ‘When one rules justly over men, ruling in the fear of God, he dawns on them like the morning light, like the sun shining forth on a cloudless morning, like rain that makes grass to sprout from the earth.’”

– 2 Samuel 23: 3-4



Octopus representing Standard Oil with tentacles wrapped around the US Congress and state capitals, as well as the steel, copper, and shipping industries, and reaching for the White House

Lesson One

History Overview and Assignments Domestic Issues Before the Country

“During the rise of industrialism that marked the second half of the nineteenth century, great captains of industry had emerged—business owners who made vast fortunes and began to wield great power—and this fact revealed the need for legislation to prevent abuse.”

– from the adapted article below

Key People, Places, and Events

McKinley Tariff Act of 1890
Benjamin Harrison
Cornelius Vanderbilt
Andrew Carnegie
John D. Rockefeller
Sherman Anti-Trust Law of 1890
World’s Columbian Exposition
Income Tax of 1894

Vocabulary

trust (business) anarchist denunciation



1892 Populist Party campaign poster

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article: *Domestic Issues Before the Country*.
- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Be sure to visit your [ArtiosHCS](#) curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. In what businesses did Vanderbilt, Carnegie, and Rockefeller each make their fortunes?
2. What is a business trust?
3. What was the purpose of the Sherman Anti-Trust Law of 1890?
4. Was the law a success or a failure? Why?
5. What were the arguments in favor of the income tax proposed in 1894?
6. How did the Supreme Court rule on the issue, and what explanation was given?

Adapted for High School from the book:
History of the United States
by Charles A. Beard and Mary R. Beard
Domestic Issues Before the Country
(1865-1897)

THE PROTECTIVE TARIFF & TAXATION

Fluctuation in Tariff Policy

As each of the old parties was divided on the currency question, it is not surprising that some confusion in their ranks developed over the tariff. Like the silver issue, the tariff tended to align the manufacturing East against the agricultural West and South rather than to cut directly between the two parties.

Still the Republicans on the whole stood firmly by the high rates imposed during the Civil War. If we except the reductions of 1872 which were soon offset by increases, we may say that those rates were substantially unchanged for nearly twenty years.

When a revision was brought about, however, it was initiated by Republican leaders. Seeing a huge surplus of revenue in the Treasury in 1883, they anticipated popular clamor by lowering the tariff on the theory that it ought to be reformed by its friends rather than by its enemies. On the other hand, it was the Republicans who would later enact the **McKinley Tariff Act of 1890**, which would carry protection to its highest point up to that time.

The Democrats for their part were not all confirmed free traders or even advocates of tariff for revenue only. During Cleveland's first administration they attacked the protective system in the House, where they had a majority, and in this they were vigorously supported by the President. The assault, however, proved to be a futile gesture, for it was blocked by the Republicans in the Senate.

Campaign of 1888

The presidential election of 1888 was fought largely on the tariff issue, and **Benjamin Harrison** of Indiana was elected over Cleveland, who had been renominated by the Democrats. Harrison received 233 electoral votes, Cleveland 168.

Benjamin Harrison's Administration *Republican: 1889-1893*

Benjamin Harrison, grandson of William Henry Harrison, was not a tall man. When Democrats referred to him as "Little Ben," Republicans retorted that he was big enough to wear the hat of his grandfather, known as "Old Tippecanoe."

Renowned as a brilliant lawyer, Benjamin Harrison was elected to serve in the US Senate, where he championed the causes of Native Americans, Civil War veterans, and homesteaders. After becoming president in 1888, he advanced vigorous foreign policy measures, such as establishing the Pan American Union to promote cooperation between the US and Latin America.

He promoted internal improvements and expansion of the navy, and he worked to protect trade against monopolies.

The tariff issue consumed most of President Harrison's attention. The high tariff rates that had brought about a Treasury surplus after the Civil War were impairing business. Tariffs were removed from imported sugar, and the surplus declined. Unfortunately, the country's prosperity began to decline as well, and Harrison was defeated by Cleveland in 1892.

ANTITRUST LEGISLATION

The Sherman Anti-Trust Law of 1890

During the rise of industrialism that marked the second half of the nineteenth century, great captains of industry had emerged—business owners who made vast fortunes and began to wield great power—and this fact revealed the need for legislation to prevent abuse.

Cornelius Vanderbilt became known as the "commodore" of the shipping field from the Northeast to the West, while **Andrew Carnegie** revolutionized the steel industry and **John D. Rockefeller** made his fortune in oil.

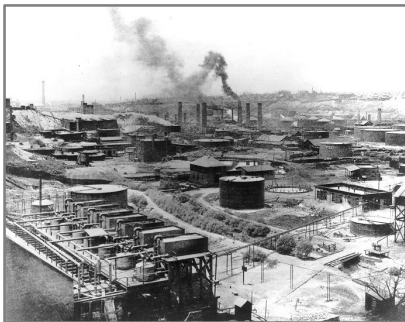


The original Breakers, a Gilded Age Queen-Anne style “cottage” on the Cliff Walk in Newport, RI, belonging to the wealthy Vanderbilt family. Considered the most magnificent estate in Newport, the home was destroyed by fire in 1892 and replaced by the current Breakers mansion.

Rockefeller bought up competing companies and then developed his businesses into a **trust**, in which a board of trustees controls all of the companies. Other business owners followed suit, with the result that prices of goods and services in the affected markets were artificially raised.

As in the case of the railways, attacks upon the trusts were first made in state legislatures, where it became the fashion to provide severe penalties for those who formed monopolies and “conspired to enhance prices.” Republicans and Democrats united in the promotion of measures of this kind.

As in the case of the railways also, the movement to curb the trusts soon had spokesmen at Washington. Though Republican James Blaine had declared that “trusts were largely a private affair with which neither the president nor any private citizen had any particular right to interfere,” it was a Republican Congress that enacted in 1890 the first measure—the **Sherman Anti-Trust Law**—directed against great combinations in business. This act declared illegal “every contract, combination in the form of trust or otherwise, or conspiracy in restraint of trade and commerce among the several states or with foreign nations.”



Standard Oil was one of the greatest companies to be broken up under United States antitrust laws

The Futility of the Anti-Trust Law

Whether the Sherman law was directed against all combinations or merely those which placed an “unreasonable restraint” on trade and competition was not apparent. Whatever its purpose, its effect upon existing trusts and upon the formation of new combinations was negligible. It was practically unenforced by Presidents Harrison and Cleveland, in spite of the constant demand for harsh action against “monopolies.” It was evident that neither the Republicans nor the Democrats were prepared for a war on big business to the bitter end.

The World’s Columbian Exposition, 1893

*The four hundredth anniversary of the discovery of America by Christopher Columbus occurred in October 1892. Preparations were made for holding a great commemorative exhibition in Chicago. But it took so long to get everything ready that the **World’s Columbian Exposition** was not held until the summer of 1893. Beautiful buildings were erected from inexpensive but satisfactory materials. They were designed with the greatest taste and filled with splendid exhibits that showcased the skill and resources of Americans, along with the products of foreign countries. Hundreds of thousands of people from throughout the world visited the exhibition, which became known as the Chicago World’s Fair, with pleasure and great profit.*

– Adapted from *A Short History of the United States*, by Edward Channing



World’s Columbian Exposition in Chicago: Swiss section (left) and Russian section (right). Photo was taken in Manufactures and Liberal Arts Building, by Hemming Hultgren (1893)

Grover Cleveland’s Second Administration

Democratic: 1893-1897

When, after Cleveland’s sweeping victory of 1892, the Democrats in the House again attempted to bring down the tariff, they were checkmated by

their own party colleagues in the upper chamber. In the end they were driven into a compromise, and President Cleveland was so dissatisfied with the resulting bill that he refused to sign it, allowing it to become a law, on the lapse of ten days, without his approval.

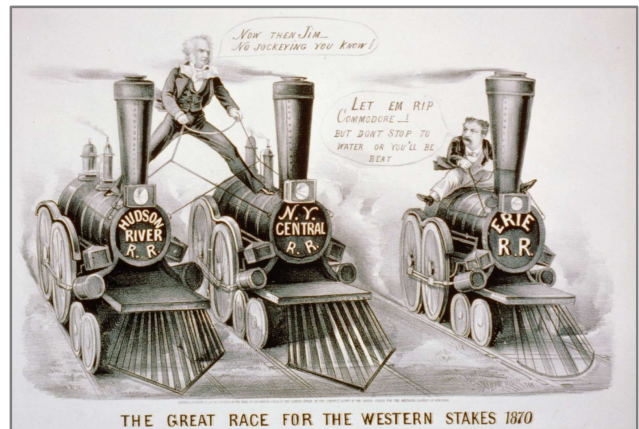
The Income Tax of 1894

The advocates of tariff reduction usually associated with their proposal a **tax on income**. The argument which they advanced in support of their program was simple. Most of the industries, they said, are in the East, and the protective tariff which taxes consumers for the benefit of manufacturers is, in effect, a tribute laid upon the rest of the country. As an offset they offered a tax on large incomes; this owing to the heavy concentration of wealthy people in the East, would fall mainly upon the beneficiaries of protection. "We propose," said one of them, "to place a part of the burden upon the accumulated wealth of the country instead of placing it all upon the consumption of the people." In this spirit, the sponsors of the Wilson tariff bill laid a tax upon all incomes of \$4,000 a year or more.

In taking this step, the Democrats encountered opposition in their own party. Senator Hill, of New York, turned fiercely upon them, exclaiming: "The professors with their books, the socialists with their

schemes, the **anarchists** with their bombs are all instructing the people in the...principles of taxation." Even the eastern Republicans were hardly as savage in their **denunciation** of the tax.

But all this labor was wasted. The next year the Supreme Court of the United States declared the income tax to be a direct tax, and therefore null and void because it was laid on incomes wherever found and not apportioned among the states according to population. The fact that four of the nine judges dissented from this decision was also an index to the diversity of opinion that divided both parties.



The Great Race for the Western Stakes, 1870, Cornelius Vanderbilt Versus James Fisk; Currier & Ives lithograph (1870)

Lesson Two

History Overview and Assignments The Minor Parties and Unrest

"Never, save at the great disruption on the eve of the Civil War, did a Democratic national convention display more feeling than at Chicago in 1896. From the opening prayer to the last motion before the house, every act, every speech, every scene, every resolution evoked passions and sowed dissensions."

– from the adapted article below

Suggested Reading and Assignments

- Review the vocabulary and the discussion questions, then read the article: *The Minor Parties and Unrest*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the

discussion questions and include key people, events, and dates within the narration.

- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.



1896 Republican campaign poster. William McKinley ran for president on the basis of the gold standard.

Key People, Places, and Events

- Grangers
- Greenback Party
- Sherman Silver Purchase Act
- Populist Party
- Panic of 1893
- Eugene V. Debs
- William Jennings Bryan
- William McKinley
- Dingley Act of 1897

Vocabulary

- portentous
- ruinous
- menace
- repudiate
- eminent

Discussion Questions

1. Describe the platform of the Greenback Party.
2. Describe the platform of the Populist Party.
3. Describe the economic crisis of 1893.
4. Describe the platform of the Republican Party.
5. Describe the platform of the Democratic Party.
6. Describe the argument and significance of William J. Bryan’s speech known as *The Cross of Gold* speech.
7. What is a corporate monopoly?

Adapted for High School from the book:
History of the United States
 by Charles A. Beard and Mary R. Beard
The Minor Parties and Unrest

The Demands of Dissenting Parties

From the election of 1872 onward, there had appeared in each presidential campaign one, and sometimes two or more, parties stressing issues that appealed mainly to wage-earners and farmers. Whether they chose to call themselves Labor Reformers, Greenbackers, or Anti-monopolists, their slogans and platforms all pointed in one direction. Even the Prohibitionists, who in 1872 started on their career with a single issue (the abolition of the liquor traffic), found themselves making declarations of faith on other matters and hopelessly split over the money question in 1896.

A composite view of the platforms put forth by the dissenting parties from the administration of Grant through the close of Cleveland’s second term reveals certain goals common to them all. These included among many others: the earliest possible

payment of the national debt, regulation of the rates of railways and telegraph companies, repeal of the Specie Payment Resumption Act of 1875, the issue of legal tender notes by the government convertible into interest-bearing obligations on demand, unlimited coinage of silver as well as gold, a graduated inheritance tax, legislation to take from “land, railroad, money, and other gigantic corporate monopolies . . . the powers they have so corruptly and unjustly usurped,” popular or direct election of United States senators, women’s suffrage, and a graduated income tax, “placing the burden of government on those who can best afford to pay instead of laying it on the farmers and producers.”

Criticism of the Old Parties

To this long program of measures the reformers added harsh and acrid criticism of the old parties and

sometimes, it must be said, of established institutions of government. “We denounce,” exclaimed the Labor Party in 1888, “the Democratic and Republican parties as hopelessly and shamelessly corrupt and by reason of their affiliation with monopolies equally unworthy of the suffrages of those who do not live upon public plunder.”

The Grangers

This unsparing, not to say revolutionary, criticism of American political life, appealed, it seems, mainly to farmers in the Midwest. Always active in politics, they had, before the Civil War, cast their lot as a rule with one or the other of the leading parties. In 1867, however, there grew up among them an association known as the “Patrons of Husbandry,” which was destined to play a large role in the partisan contests of the succeeding decades.

This society, which organized local lodges or “granges”—hence known as **Grangers**—on principles of secrecy and fraternity, was originally designed to promote in a general way the interests of the farmers. Its political bearings were apparently not grasped at first by its promoters. Yet, appealing as it did to the most active and independent spirits among the farmers and gathering to itself the strength that always comes from organization, it soon found itself in the hands of leaders more or less involved in politics. Where votes are marshaled together in a democracy, there is power.

The Greenback Party

The first extensive activity of the Grangers was an attack on the railway rates in the Middle West, which forced several state legislatures to reduce freight and passenger rates by law. At the same time, some leaders in the movement, no doubt emboldened by this success, launched in 1876 a new political party, popularly known as the **Greenback Party**, favoring a continued re-issue of the legal tenders. The beginnings were disappointing; but two years later, in the congressional elections, the Greenbackers swept whole sections of the country. Their candidates polled more than a million votes, and fourteen of them were sent to the House of Representatives. To all outward signs a new and formidable party had entered the lists.

The sanguine hopes of the leaders proved to be illusory, however. The quiet operations of the Resumption Act the following year, a revival of industry from a severe panic which had set in during 1873, the **Sherman Silver Purchase Act** (which

required the government to purchase large amounts of silver every month in order to artificially inflate silver value), and the re-issue of Greenbacks cut away some of the grounds of agitation. There was also a diversion of forces to the silver faction, which had substantial support among the silver mine owners of the West.

At all events, the Greenback vote fell to about 300,000 in the election of 1890. A still greater drop came four years later, and the party gave up the ghost, its sponsors returning to their former allegiance or sulking in their tents.



Promotional poster (c.1873) that offers a “gift for the grangers.” The Grange in the US is a social organization that lobbies to promote the economic and political well-being of the community and agriculture. Founded after the Civil War in 1867, the Grange is the oldest American agricultural advocacy group with a national scope.

The Rise of the Populist Party

Those leaders of the old parties who now looked for a happy future unvexed by new factions were doomed to disappointment. The funeral of the Greenback party was hardly over before there arose two other political specters in the agrarian sections: the National Farmers’ Alliance and Industrial Union, particularly strong in the South and West; and the Farmers’ Alliance, operating in the North. By 1890 the two orders claimed over three million members.

As in the case of the Grangers many years before, the leaders among them found an easy way into politics. In 1892 they held a convention, nominated a candidate for president, and adopted the name of “People’s Party,” from which they were known as the **Populist Party**. Their platform, in every line, breathed a spirit of radicalism. They declared that “the newspapers are largely subsidized or muzzled, public opinion silenced, business prostrate, our homes covered with mortgages, and the land

concentrating in the hands of capitalists . . . The fruits of the toil of millions are boldly stolen to build up colossal fortunes for a few.”

Having delivered this sweeping indictment, the Populists put forward their remedies: the free coinage of silver, a graduated income tax, postal savings banks, and government ownership of railways and telegraphs. At the same time they approved the initiative, referendum, and popular election of senators, and condemned the use of federal troops in labor disputes.

On this platform, the Populists polled over a million votes, captured twenty-two presidential electors, and sent a powerful delegation to Congress.

Industrial Distress Augments Unrest

The early 1890s brought forth many events which aggravated the ill-feeling expressed in the **portentous** platform of Populism. The silver purchase plan had backfired because investors bought silver cheaply on the metal market, sold it to the government in exchange for gold, and thus raised the price of gold while lowering the price of silver. By the early 1890s silver was worth only forty-nine cents on the dollar in gold. Cleveland, a consistent enemy of free silver, gave his powerful support to the gold standard and insisted on the repeal of the Silver Purchase Act, thus alienating an increasing number of his own party.

The Panic of 1893

In 1893 a grave industrial crisis fell upon the land: banks and business houses went into bankruptcy with startling rapidity; factories were closed; idle men thronged the streets hunting for work; and the prices of wheat and corn dropped to a **ruinous** level. Labor disputes also filled the crowded record. A strike at the Pullman car works in Chicago spread to the railways. Disorders ensued, and the crisis became known as the **Panic of 1893**.

President Cleveland, against the protests of the governor of Illinois, dispatched troops to the scene of action. The United States district court at Chicago issued an injunction forbidding the president of the Railway Union, **Eugene V. Debs**, or his assistants to interfere with the transmission of the mails or interstate commerce in any form. For refusing to obey the order, Debs was arrested and imprisoned. With federal troops in possession of the field, with their leader in jail, the strikers gave up the battle, defeated but not subdued.

To cap the climax the Supreme Court of the

United States the following year (1895) declared null and void the income tax law just enacted by Congress, thus fanning the flames of Populist discontentment all over the West and South.

THE SOUND MONEY BATTLE OF 1896

Conservative Men Alarmed

Men of conservative thought and leaning in both parties were by this time thoroughly disturbed. They looked upon the rise of Populism and the growth of labor disputes as the signs of a revolutionary spirit, indeed nothing short of a **menace** to American institutions and ideals.

The Republicans Come Out For the Gold Standard

It was among the Republicans that this opinion was most widely shared and firmly held. It was they who picked up the glove thrown down by the Populists, though a host of Democrats, like Cleveland and Hill of New York, also battled against the growing Populist defection in Democratic ranks.

When the Republican National Convention assembled in 1896, the die was soon cast; a declaration of opposition to free silver save by international agreement was carried by a vote of eight to one. The Republican Party, to use the vigorous language of Mr. Lodge, arrayed itself against “not only that organized failure, the Democratic Party, but all the wandering forces of political chaos and social disorder. . . in these bitter times when the forces of disorder are loose and the wreckers with their false lights gather at the shore to lure the ship of state upon the rocks.”

Yet it is historic truth to state that **William McKinley**, whom the Republicans nominated, had voted in Congress for the free coinage of silver, was widely known as a bimetalist, and was only with difficulty persuaded to accept the unequivocal endorsement of the gold standard which was pressed upon him by his counselors. Having accepted it, however, he proved to be a valiant champion, though his major interest was undoubtedly in the protective tariff. To him nothing was more reprehensible than attempts “to array class against class, ‘the classes against the masses,’ section against section, labor against capital, ‘the poor against the rich,’ or interest against interest.” Such was the language of his acceptance speech. The whole program of Populism he now viewed as a “sudden, dangerous, and revolutionary assault upon law and order.”

The Democratic Convention at Chicago

Never, save at the great disruption on the eve of the Civil War, did a Democratic national convention display more feeling than at Chicago in 1896. From the opening prayer to the last motion before the house, every act, every speech, every scene, every resolution evoked passions and sowed dissensions.

Departing from long party custom, it voted down in anger a proposal to praise the administration of the Democratic president, Cleveland. When the platform with its radical planks including free silver, was reported, a veritable storm broke out. Senator Hill, trembling with emotion, protested against the departure from old tests of Democratic allegiance; against principles that must drive out of the party men who had grown gray in its service; against revolutionary, unwise, and unprecedented steps in the history of the party. Senator Vilas of Wisconsin, in great fervor, avowed that there was no difference in principle between the free coinage of silver—“the confiscation of one-half of the credits of the nation for the benefit of debtors”—and communism itself—“a universal distribution of property.” In the triumph of that cause he saw the beginning of “the overthrow of all law, all justice, all security and repose in the social order.”

The Cross of Gold Speech

The champions of free silver, who became known as “Silverites,” replied in strident tones. They accused the gold advocates of being the aggressors who had assailed the labor and the homes of the people.

William Jennings Bryan from Nebraska voiced their sentiments in a memorable oration. He declared that their cause “was as holy as the cause of liberty—the cause of humanity.” He exclaimed that the contest was between the idle holders of idle capital and the toiling millions. Then he named those for whom he spoke—the wage-earner, the country lawyer, the small merchant, the farmer, and the miner. “The man who is employed for wages is as much a businessman as his employer. The attorney in a country town is as much a businessman as the corporation counsel in a great metropolis. The merchant at the crossroads store is as much a businessman as the merchant of New York. The farmer . . . is as much a businessman as the man who goes upon the board of trade and bets upon the price of grain. . . . It is for these that we speak. We do not come as aggressors. Ours is not a war of conquest.

We are fighting in defense of our homes, our families, and our posterity. We have petitioned, and our petitions have been scorned. We have entreated, and our entreaties have been disregarded. We have begged, and they have mocked when our calamity came. We beg no longer; we entreat no more; we petition no more. We defy them . . . We shall answer their demands for a gold standard by saying to them, ‘You shall not press upon the brow of labor this crown of thorns. You shall not crucify mankind upon a cross of gold.’”



Cartoon from Puck showing a Silverite farmer and a Democratic donkey whose wagon has been destroyed by the locomotive of sound money

Bryan Nominated

In all the history of national conventions never had an orator so completely swayed a multitude. The delegates, after cheering Mr. Bryan until they could cheer no more, tore the standards from the floor and gathered around the Nebraska delegation to renew the deafening applause.

The platform as reported was carried by a vote of two to one and the young orator from the West, hailed as America’s Tiberius Gracchus, was nominated as the Democratic candidate for president. The South and West had triumphed over the East. The Gold Democrats were **repudiated** in terms which were clear to all. A few, unable to endure the thought of voting the Republican ticket, held a convention at Indianapolis where, with the sanction of Cleveland, they nominated candidates of their own and endorsed the gold standard in a forlorn hope.

The Democratic Platform

It was to the call from Chicago that the Democrats gave heed and the Republicans made answer. The platform on which Mr. Bryan stood, unlike most party manifestoes, was explicit in its language and its appeal. It denounced the practice of allowing national banks to issue notes intended to circulate as money on the ground that it was “in

derogation of the Constitution,” recalling Jackson’s famous attack on the Bank in 1832. It declared that tariff duties should be laid “for the purpose of revenue”—Calhoun’s doctrine. In demanding the free coinage of silver, it returned to the practice abandoned in 1873.

The income tax came next on the program. The platform alleged that the law of 1894, passed by a Democratic Congress, was “in strict pursuance of the uniform decisions of the Supreme Court for nearly a hundred years,” and then hinted that the decision annulling the law might be reversed by the same body “as it may hereafter be constituted.”

The appeal to labor voiced by Mr. Bryan in his “crown of thorns” speech was reinforced in the platform. “As labor creates the wealth of the country,” ran one plank, “we demand the passage of such laws as may be necessary to protect it in all its rights.” Referring to the recent Pullman strike, the passions of which had not yet died away, the platform denounced “arbitrary interference by federal authorities in local affairs as a violation of the Constitution of the United States and a crime against free institutions.”

The remedy advanced was a federal law assuring trial by jury in all cases of contempt in labor disputes. Having made this declaration of faith, the Democrats, with Mr. Bryan at the head, raised their standard of battle.



William Jennings Bryan depicted as a Populist snake swallowing the Democratic Party. 1896 cartoon from the pro-GOP magazine *Judge*

The Heated Campaign

The campaign which ensued outrivaled in the range of its educational activities and the bitterness of its tone all other political conflicts in American history, not excepting the fateful struggle of 1860. Immense sums of money were contributed to the funds of both parties. Railway, banking, and other corporations gave generously to the Republicans; the silver miners, less lavishly but with the same anxiety, supported the Democrats. The country was flooded with pamphlets, posters, and handbills. Every public forum, from the great auditoriums of the cities to the

“red schoolhouses” on the countryside, was occupied by the opposing forces.

Mr. Bryan took the stump himself, visiting all parts of the country in special trains and addressing literally millions of people in the open air. Mr. McKinley chose the older and more formal plan. He received delegations at his home in Canton and discussed the issues of the campaign from his front porch, leaving to an army of well-organized orators the task of reaching the people in their hometowns. Parades, processions, and monster demonstrations filled the land with politics.

Whole states were polled in advance by the Republicans and the doubtful voters personally visited by men equipped with arguments and literature. Manufacturers, frightened at the possibility of disordered public credit, announced that they would close their doors if the Democrats won the election. Men were dismissed from public and private places on account of their political views, one **eminent** college president being forced out for advocating free silver. The language employed by impassioned and embittered speakers on both sides roused the public to a state of frenzy, once more showing the lengths to which men could go in personal and political abuse.

The Republican Victory

The verdict of the nation was decisive. McKinley received 271 of the 447 electoral votes, and 7,111,000 popular votes as against Bryan’s 6,509,000. The congressional elections were equally positive although, on account of the composition of the Senate, the “hold-over” Democrats and Populists still enjoyed a power out of proportion to their strength as measured at the polls. Even as it was, the Republicans got full control of both houses—a dominion of the entire government which they were to hold for fourteen years—until the second half of Mr. Taft’s administration, when they lost possession of the House of Representatives.

The yoke of indecision was broken. The party of sound finance and protective tariffs set out upon its lease of power with untroubled assurance.

REPUBLICAN MEASURES AND RESULTS

William McKinley’s Administration

Republican: 1897-1901

The Gold Standard and the Tariff

Strange as it may seem, the Republicans did not at once enact legislation making the gold dollar the

standard for the national currency. Not until 1900 did they take that positive step.

In his inaugural address President McKinley, as if still uncertain in his own mind or fearing a revival of the contest just closed, placed the tariff, not the money question, in the forefront. "The people have decided," he said, "that such legislation should be had as will give ample protection and encouragement to the industries and development of our country." Protection for American industries, therefore, he urged, is the task before Congress. "With adequate revenue secured, but not until then, we can enter upon changes in our fiscal laws."

As the Republicans had only forty-six of the ninety Senators, and at least four of them were known advocates of free silver, the discretion exercised by the President in selecting the tariff for congressional debate was the better part of valor.

Congress gave heed to the warning. Under the direction of Nelson P. Dingley, whose name was given to the bill, a tariff measure levying the highest rates yet laid in the history of American imposts was prepared and driven through the House of Representatives. The opposition encountered in the Senate, especially from the West, was overcome by concessions in favor of that section; but the duties on sugar, tin, steel, lumber, hemp, and in fact all of the essential commodities handled by combinations and trusts, were materially raised.

Growth of Combinations

The years that followed the enactment of the **Dingley Act of 1897** were, whatever the cause, the most prosperous the country had witnessed for many a decade. Industries of every kind were soon running full blast, labor was employed, and commerce spread more swiftly than ever to the markets of the world. Coincident with this progress was the organization of the greatest combinations and trusts the world had yet seen. In 1899 the smelters formed a trust with a capital of \$65,000,000; in the same year, the Standard Oil Company with a capital of over one hundred million took the place of the old trust; and the Copper Trust was incorporated under the laws of New Jersey, its par value capital being fixed shortly afterward at \$175,000,000.

A year later the National Sugar Refining Company of New Jersey started with a capital of \$90,000,000, adopting the policy of issuing to the stockholders no public statement of its earnings or financial condition. Before another twelvemonth had elapsed, all previous corporate financing was

reduced to small proportions by the flotation of the United States Steel Corporation with a capital of more than a billion dollars, an enterprise set in motion by the famous Morgan banking house of New York.

In nearly all these gigantic undertakings, the same great leaders in finance were more or less intimately associated. To use the language of an eminent authority: "They are all allied and intertwined by their various mutual interests. For instance, the Pennsylvania Railroad interests are on the one hand allied with the Vanderbilts and on the other with the Rockefellers. The Vanderbilts are closely allied with the Morgan group . . . Viewed as a whole, we find the dominating influences in the trusts to be made up of a network of large and small capitalists, many allied to one another by ties of more or less importance, but all being appendages to or parts of the greater groups which are themselves dependent on and allied with the two mammoth or Rockefeller and Morgan groups. These two mammoth groups jointly . . . constitute the heart of the business and commercial life of the nation." Such was the picture of triumphant business enterprise drawn by a financier within a few years after the memorable campaign of 1896.

America had become one of the first workshops of the world. It was, by virtue of the closely knit organization of its business and finance, one of the most powerful and energetic leaders in the struggle of the giants for the business of the earth. The capital of the Steel Corporation alone was more than ten times the total national debt which the apostles of calamity in the days of Washington and Hamilton declared the nation could never pay. American industry, filling domestic markets to overflowing, was ready for new worlds to conquer.



Illustration showing a troop of senators as Confederate soldiers, led by an officer on horseback labeled "Trusts", marching down a street past the house with "Barbara Fritchie" labeled "Dingley Tariff" leaning out the window, waving a flag labeled "High Protection", *Puck*, February 1905

Lesson Three

History Overview and Assignments Advances in the Field of Electricity

“The incandescent lamp and the central power station, considered together, may be regarded as one of the most fruitful conceptions in the history of applied electricity.”

– from the adapted article below



Thomas A. Edison Industries Exhibit, Primary Battery section, Edison National Historic Site (1915)

Key People, Places, and Events

William Gilbert
Benjamin Franklin
Joseph Henry
Thomas A. Edison
International Exposition of Electricity
General Electric Company
George Westinghouse

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article: *The Fathers of Electricity*.
- Narrate about today's reading using the appropriate notebook page. Be sure to include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Instead of answering discussion questions, prepare a paper, presentation, or demonstration on one of the inventions or discoveries discussed in this article and share it with your class.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Vocabulary and Inventions

lodestone	dynamo	electric railway line	alternating current
amber	incandescent lamp	elevator	turbine
jet	central power station	adjunct	hydroelectric power
electromagnetic induction			

Adapted for High School from the book:
The Age of Invention, a Chronicle of Mechanical Conquest
by Holland Thompson
The Fathers of Electricity

It may startle some readers to be told that the foundations of modern electrical science were established in the Elizabethan Age. The England of

Queen Elizabeth, of Shakespeare, of Drake and the sea-dogs, is seldom thought of as the cradle of the science of electricity. Nevertheless it was, just as

surely as it was the birthplace of the Shakespearean drama, of the King James Version of the Bible, or of that maritime adventure and colonial enterprise which finally grew and blossomed into the United States of America.

The accredited father of the science of electricity and magnetism is **William Gilbert**, who was a physician and man of learning at the court of Elizabeth. Prior to him, all that was known of these phenomena was what the ancients knew, that **lodestones** (pieces of the mineral magnetite) possessed magnetic properties and that **amber** (fossilized tree resin) and **jet** (a black gemstone composed of coal), when rubbed, would attract bits of paper or other substances of small specific gravity. Gilbert's great treatise *On the Magnet*, printed in Latin in 1600, containing the fruits of his research and experiments for many years, indeed provided the basis for a new science.

On foundations well and truly laid by Gilbert, numerous others such as Otto von Guericke of Germany, Du Fay of France, and Stephen Gray of England, added to the structure of electrical knowledge. The Leyden jar, in which the mysterious force could be stored, was invented in Holland in 1745 and in Germany almost simultaneously.

In America, **Benjamin Franklin** found out, as we have seen earlier, that electricity and lightning are one and the same, and in the lightning rod he made the first practical application of electricity. Afterward Cavendish of England, Coulomb of France, and Galvani of Italy all brought new bricks to the pile. Following them came a group of master builders, among whom may be mentioned: Alessandro Volta of Italy, Hans Christian Oersted of Denmark, André-Marie Ampère of France, George Simon Ohm of Germany, Michael Faraday and William Sturgeon of England, and Joseph Henry of America.

Joseph Henry

Among these men, who were, it should be noted, theoretical investigators, rather than practical inventors like Morse, or Bell, or Edison, the American **Joseph Henry** ranks highly. His first discovery was that a magnet's force could be immensely strengthened by winding it with insulated, electrified wire. He was the first to employ insulated wire wound as on a spool and was able finally to make a magnet which would lift thirty-five hundred pounds. He first showed the difference between "quantity" magnets composed of short

lengths of wire connected in parallel, excited by a few large cells, and "intensity" magnets wound with a single long wire and excited by a battery composed of cells in series. This was an original discovery which greatly increased both the immediate usefulness of the magnet and its possibilities for future experiments.

The learned men of Europe—Faraday, Sturgeon, and the rest—were quick to recognize the value of the discoveries of the young Albany schoolmaster. Sturgeon magnanimously wrote: "Professor Henry has been enabled to produce a magnetic force which totally eclipses every other in the whole annals of magnetism; and no parallel is to be found since the miraculous suspension of the celebrated Oriental imposter in his iron coffin."¹

The Tale of the Oriental Imposter

According to the Roman scholar Pliny the Elder, the Temple of Serapis in Alexandria had been built with powerful lodestones, so powerful that the iron coffin of Cleopatra's younger sister was said to have been suspended in the air. The story over the centuries was altered to be supposedly about Mohammed, the founder of Islam.

Henry also discovered the phenomena of **electromagnetic induction**. A current sent through a wire in the second story of a building induced currents through a similar wire in the cellar two floors below. In this, Henry preceded Faraday's discovery of the same phenomenon, although Henry's results were not published until he had heard rumors of Faraday's discovery, which he thought to be something different.

The attempt to send signals by electricity had been made many times before Henry became interested in the problem. He strung a mile of fine wire, placed an "intensity" battery at one end, and made a bell ring at the other. Thus, he discovered the essential principle of the electric telegraph. This discovery was made in 1831, a year before the idea of a working electric telegraph flashed on the mind of Morse.

Henry next turned to the possibility of a magnetic engine to produce power and succeeded in making a reciprocating-bar motor. Later, he confirmed an earlier experiment of using the earth as return conductor, showed how a feeble current could be strengthened, and how a small magnet could be used as a circuit maker and breaker. Here were the principles of the telegraph relay and the **dynamo**.

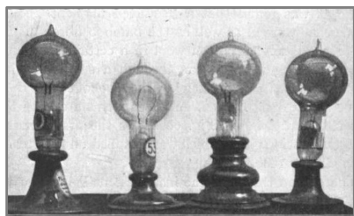
He studied terrestrial magnetism and building materials. He developed meteorology into a science, collecting reports by telegraph, made the first weather map, and issued forecasts of the weather based upon verifiable knowledge rather than upon signs. He became a member of the Lighthouse Board in 1852 and was the head after 1871. The excellence of marine illuminants and fog signals today is largely due to his efforts.

The Smithsonian Institution was founded in Washington DC in 1846, and Henry was fittingly chosen to be its chief executive officer. And from that time until his death in 1878, over thirty years, he devoted himself to science in general.

Though he was drawn into a controversy with Morse over the credit for the invention of the telegraph, Henry used his influence in helping Morse renew his patent. He listened with attention to Alexander Graham Bell, who had the idea that electric wires might be made to carry the human voice and encouraged him to proceed with his experiments.

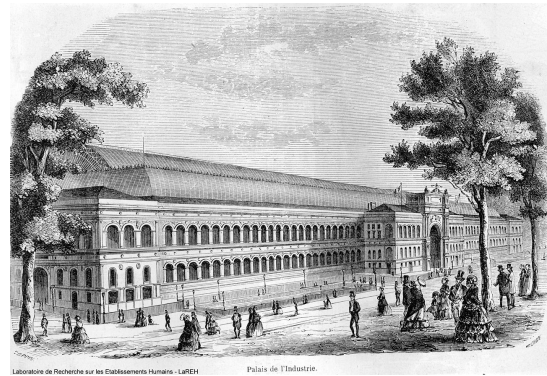
Thomas Edison

The great inventor **Thomas Alva Edison** did work for the Western Union Telegraph Company, both in telegraphy and telephony. He built laboratories and factories at Menlo Park, New Jersey, and it was there that he invented the phonograph, for which he received the first patent in 1878. It was there, too, that he began that wonderful series of experiments which gave to the world the **incandescent lamp**. He had noticed the growing importance of outdoor arc lighting but was convinced that his mission was to produce an electric lamp for use indoors. After fourteen months of hard work and the expenditure of forty thousand dollars, a carbonized cotton thread sealed in one of Edison's globes lasted forty hours. "If it will burn forty hours now," said Edison, "I know I can make it burn a hundred." And so he did. A better filament was needed. Edison found it in carbonized strips of bamboo.



Edison carbon filament lamps, early 1880s, from *The Story of Great Inventions*, by Elmer Ellsworth Burns (1910)

Edison developed his own type of dynamo, the largest ever made up to that time, and, along with the Edison incandescent lamps, it was one of the wonders of the **International Exposition of Electricity**, held in Paris in 1881. The installation in Europe and America of plants for service followed. Edison's first great central station, supplying power for three thousand lamps, was erected at Holborn Viaduct, London, in 1882, and in September of that year the Pearl Street Station in New York City, the first central station in America, was put into operation.



La Palais de l'Industrie, constructed in Paris by Alexis Barrault, became the site of the 1881 International Exposition of Electricity.

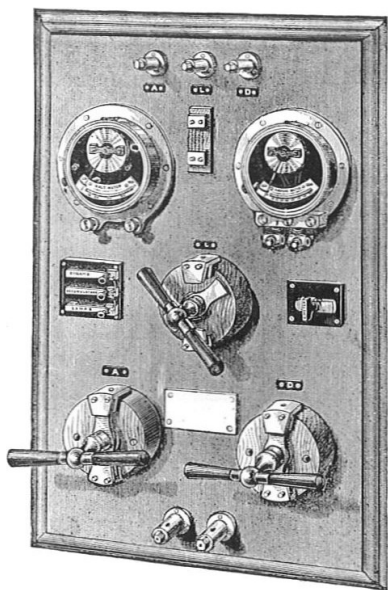
The incandescent lamp and the **central power station**, considered together, may be regarded as one of the most fruitful conceptions in the history of applied electricity. It comprised a complete generating, distributing, and utilizing system, from the dynamo to the very lamp at the fixture, ready for use. It even included a meter to determine the amount of current actually consumed. The success of the system was complete, and as fast as lamps and generators could be produced, they were installed to give a service at once recognized as superior to any other form of lighting. By 1885 the Edison lighting system was commercially developed in all its essentials, though still subject to many improvements and capable of great enlargement, and soon Edison sold out his interests in it and turned his great mind to other inventions.

The inventive ingenuity of others brought in time better and more economical incandescent lamps. From the filaments of bamboo fiber the next step was to filaments of cellulose in the form of cotton, duly prepared and carbonized. Later (1905) came the metalized carbon filament and finally the employment of tantalum or tungsten. The tungsten lamps first made were very delicate, and it was not until W.D. Coolidge, in the research laboratories of

the **General Electric Company** at Schenectady, invented a process for producing ductile tungsten that they became available for general use.

The dynamo and the central power station brought the electric motor into action. The dynamo and the motor do precisely opposite things. The dynamo converts mechanical energy into electric energy. The motor transforms electric energy into mechanical energy. But the two work in partnership, and without the dynamo to manufacture the power the motor could not thrive. Moreover, the central station was needed to distribute the power for transportation as well as for lighting.

Edison's small motors possessed several advantages over the big steam engine. They ran smoothly and noiselessly on account of the absence of reciprocating parts. They consumed current only when in use. They could be installed and connected with a minimum of trouble and expense. They emitted neither smell nor smoke. Edison built an experimental **electric railway line** at Menlo Park in 1880 and proved its practicability. The electric railway spread quickly over the land, obliterating the old horsecars, and greatly enlarging the circumference of the city. Moreover, on the steam roads, at all the great terminals, and wherever there were tunnels to be passed through, the old giant steam engine in time yielded place to the electric motor.



Early switchboard (c.1888)

The application of the electric motor to the “vertical railway,” or **elevator**, made possible the steel skyscraper.

Edison, already famous as “the Wizard of Menlo

Park,” established new factories and laboratories at West Orange, New Jersey, in 1887, from where he sent forth a constant stream of inventions, some new and startling, others improvements on old devices. From these laboratories in 1903 came a new type of storage battery, which he afterwards improved. The storage battery, as everyone knows, is used in the propulsion of electric vehicles and boats, in the lighting of trains, and in the ignition and starting of gasoline engines. As an **adjunct** of the gas-driven automobile, it renders the starting of the engine independent of muscle power previously needed for cranking.

The dynamo brought into service not only light and power but heat; and the electric furnace in turn gave rise to several great metallurgical and chemical industries. Elihu Thomson's process of welding by means of the arc furnace found wide and varied applications. The commercial production of aluminum is due to the electric furnace and dates from 1886. It was in that year that H.Y. Castner of New York and C.M. Hall of Pittsburgh both invented the methods of manufacture which gave to the world the new metal, malleable and ductile, exceedingly light, and capable of a thousand uses. Another valuable product of the electric furnace was the calcium carbide first produced in 1892 by Thomas L. Wilson of Spray, North Carolina. This calcium carbide is the basis of acetylene gas, a powerful illuminant, and it is widely used in metallurgy, for welding and other purposes.

Alternating Current

At the same time with these developments the value of the **alternating current** came to be recognized. The transformer, an instrument developed on foundations laid by Henry and Faraday, made it possible to transmit electrical energy over great distances with little loss of power. Alternating currents were transformed by means of this instrument at the source and were again converted at the point of use to a lower and convenient potential for local distribution and consumption. The first extensive use of the alternating current was in arc lighting, where the higher potentials could be employed on series lamps. Perhaps the chief American inventor in the domain of the alternating current is Elihu Thomson, who began his useful career as professor of chemistry and mechanics in the Central High School of Philadelphia. Another great protagonist of the alternating current was **George Westinghouse**,

who was quite as much an improver and inventor as a manufacturer of machinery. Two other inventors, at least, should not be forgotten in this connection: Nicola Tesla and Charles S. Bradley, both of whom had worked for Edison and helped develop the three-phase AC system used today.

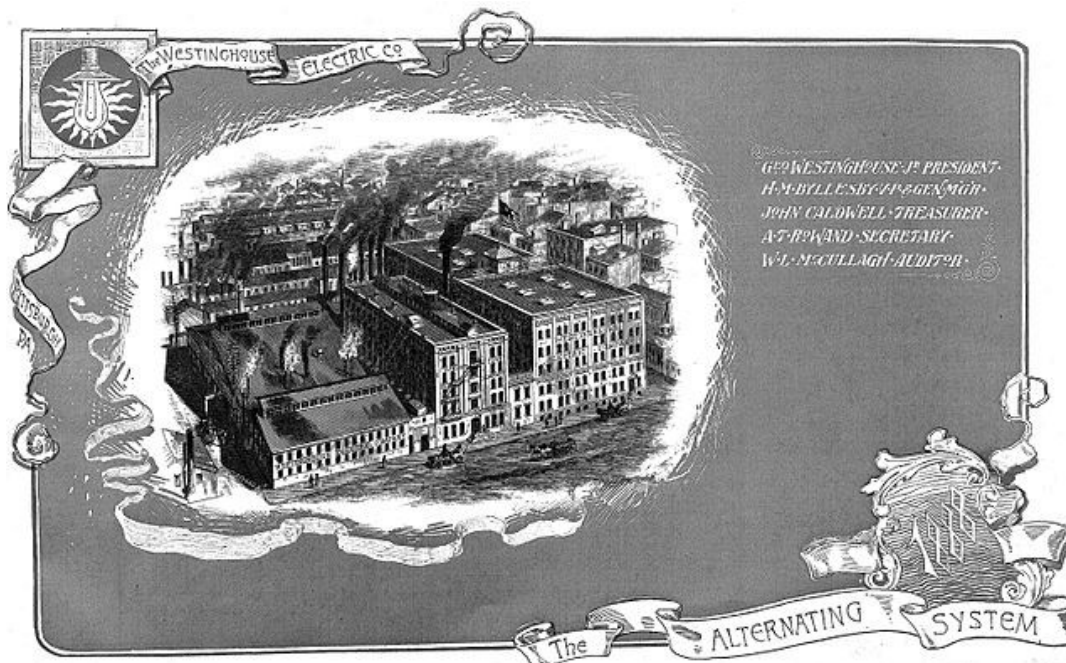
The **turbine** (from the Latin *turbo*, meaning a whirlwind) is the name of the motor which drives the great dynamos for the generation of electric energy. It may be either a steam turbine or a water turbine.

The steam turbine of Curtis or Parsons became the prevailing engine. But the development of **hydroelectric power** has gone far.

The first commercial hydro-station for the transmission of power in America was established in 1891 in Colorado. The motors and generators for this station came from the Westinghouse plant in Pittsburgh, and Westinghouse also supplied the turbo-generators which inaugurated, in 1895, the delivery of power from Niagara Falls.



Schoellkopf mills on Niagara Falls in 1900. Power stations are visible on the lower right.



Westinghouse Electric Company 1888 catalog advertising their "Alternating System"

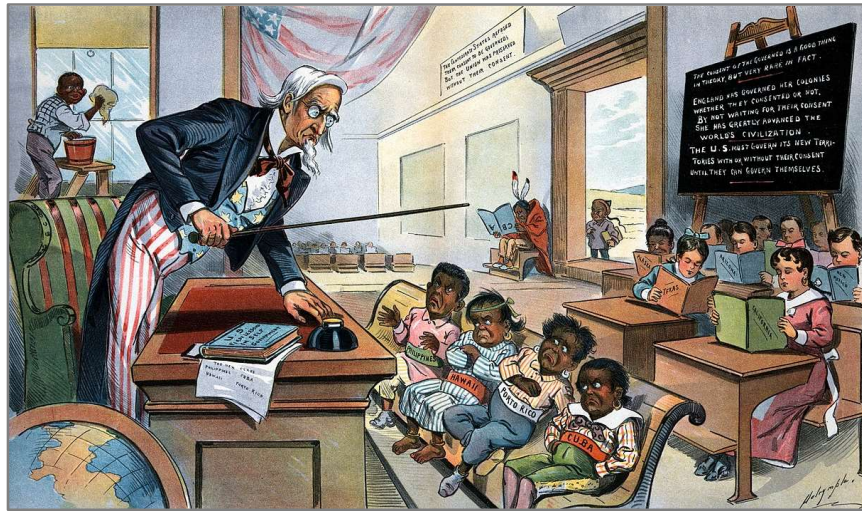
¹ *Philosophical Magazine*, vol. XI, p. 199 (March 1832).

The Artios Home Companion Series

Unit 9: America Becomes a World Power

Teacher Overview

BETWEEN THE AMERICAN CIVIL WAR and the end of the nineteenth century, America became a major world power, influencing the course of international affairs and taking possession of several new territories. Neither in the field of commercial enterprise nor in that of diplomacy has the nation ever been lacking in spirit or ingenuity—but concerns were raised by America’s imperialistic actions during this era.



Caricature by Louis Dalrymple showing Uncle Sam lecturing four children labeled Philippines, Hawaii, Puerto Rico, and Cuba, in front of children holding books labeled with various US states. A boy of African descent is washing windows, a Native American sits separate from the class, and a Chinese boy is outside the door. The caption reads: “School Begins. Uncle Sam (to his new class in Civilization): ‘Now, children, you’ve got to learn these lessons whether you want to or not! But just take a look at the class ahead of you, and remember that, in a little while, you will feel as glad to be here as they are!’”

Suggested Assignments

In this unit, students will:

- Complete two lessons in which they will learn about **how America became a world power**, and the **state of world affairs by the turn of the twentieth century**, journaling and answering discussion questions as they read.
- Define vocabulary words.
- Do some outside research on the history of Cuba and prepare to share what they learn.
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

Scripture addresses the Christian’s responsibility to government—to obey laws that do not violate Biblical principles.

Let every person be subject to the governing authorities. For there is no authority except from God, and those that exist have been instituted by God. Therefore whoever resists the authorities resists what God has appointed, and those who resist will incur judgment . . . Therefore one must be in subjection, not only to avoid God’s wrath but also for the sake of conscience. For because of this you also pay taxes, for the authorities are ministers of God, attending to this very thing. Pay to all what is owed to them: taxes to whom taxes are owed, revenue to whom revenue is owed, respect to whom respect is owed, honor to whom honor is owed.

– Romans 13:1-7

God created all human beings equal in His sight. Although we may have different and individual God-ordained purposes, God sees us as equal.

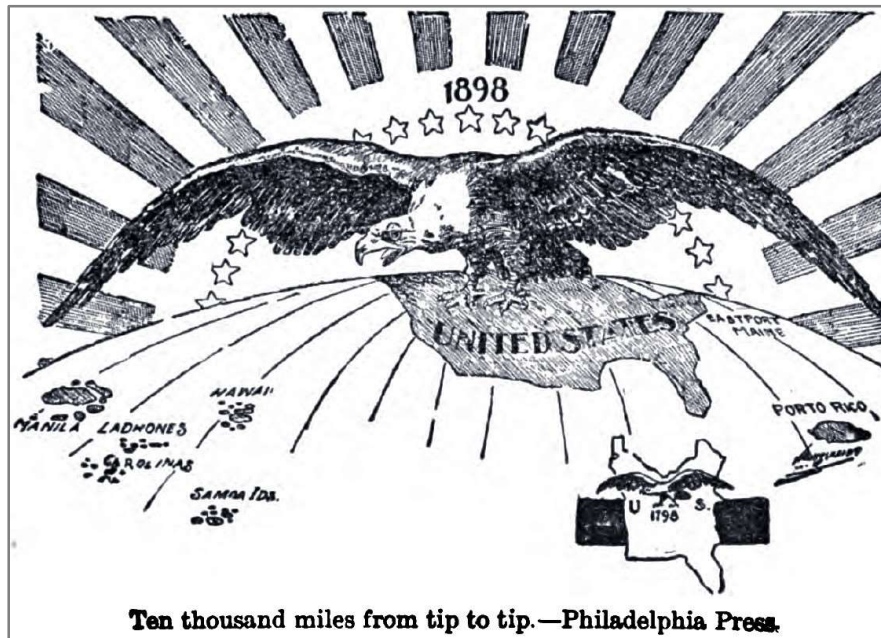
There is neither Jew nor Greek, there is neither slave nor free, there is no male and female, for you are all one in Christ Jesus.

– Galatians 3:28

Lesson One

History Overview and Assignments America, a World Power

DURING THE LATER YEARS of the nineteenth century, America had numerous opportunities to demand rights in dealings with France, Mexico, Samoa, the purchase of Alaska, American interests in the Caribbean, the Venezuela Affair, and more. Concerns were raised, though, by America's acquisition of territories during this time.



Ten Thousand Miles From Tip to Tip, meaning the extension of United States domination (symbolized by a bald eagle) from Puerto Rico to the Philippines. The cartoon contrasts this with a map of the smaller United States of 100 years earlier in 1796.

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article: *America, a World Power*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Vocabulary

coerce
protectorate

appropriation
portent

bellicose
propriety

cavalier
impugn

Key People, Places, and Events

Samoa Islands
Grover Cleveland
Venezuela Affair
Annexation of Hawaii
Liliuokalani
Benjamin Harrison

Discussion Questions

1. What is meant by the term “world power,” as used in this article?
2. Describe American foreign relations in Samoa during the era covered by this article.
3. Describe American foreign relations in the Caribbean.
4. Describe American foreign relations in the Venezuela Affair.
5. What was the result of the investigation into the Venezuela Affair?
6. How were the islands of Hawaii gained by the United States?
7. What objection was made by President Cleveland to these proceedings?

Adapted for High School from the book:
History of the United States
by Charles A. Beard and Mary R. Beard
America, a World Power

It became a fashion, sanctioned by wide usage and by eminent historians, to speak of America as entering the twentieth century in the role of “a world power” for the first time. Perhaps at this late day, it is useless to protest the idea. Nevertheless, the truth is that between the fateful moment in March of 1775 when Edmund Burke unfolded to his colleagues in the British Parliament the resources of an invincible America, and the settlement at Versailles in 1919 closing the drama of World War I, America became a world power, influencing by its example, by its institutions, by its wealth, trade, and arms the course of international affairs. And it should be said also that neither in the field of commercial enterprise nor in that of diplomacy has it been lacking in spirit or ingenuity.

When John Hay, secretary of state, heard that an American citizen, Perdicaris, had been seized by Raisuli, a Moroccan bandit, in 1904, he wired his brusque message: “We want Perdicaris alive or Raisuli dead.” This was but an echo of Commodore Decatur’s equally characteristic answer, “Not a minute,” given nearly a hundred years before to the pirates of Algiers begging for time to consider whether they would cease preying upon American merchantmen. Was it not as early as 1844 that the American commissioner, Caleb Cushing, taking advantage of the British Opium War on China, negotiated with the Celestial Empire a successful commercial treaty? Did he not then exultantly exclaim: “The laws of the Union follow its citizens, and its banner protects them even within the domain of the Chinese Empire”? Was it not almost half a century before the Battle of Manila Bay in 1898, that Commodore Perry with an adequate naval force “gently **coerced** Japan into friendship” with America, leading all the nations of the earth in the

opening of that empire to the trade of the Occident? Nor is it inappropriate in this connection to recall the fact that the Monroe Doctrine celebrated in 1923 its hundredth anniversary.

AMERICAN FOREIGN RELATIONS (1865-1898)

Samoa

If the Senate had its doubts at first about the wisdom of acquiring strategic points for naval power in distant seas, the same could not be said of the State Department or naval officers. In 1872 Commander Meade of the United States Navy, alive to the importance of coaling stations even in mid-ocean, made a commercial agreement with the chief of Tutuila, one of the **Samoa Islands**, far below the equator in the southern Pacific and nearer to Australia than to California. This agreement, providing among other things for American use of the harbor of Pago Pago as a naval base, was six years later changed into a formal treaty ratified by the Senate.



A joint commission of Germany, the United States, and Great Britain abolished the Samoan kingship in June 1899.

Such an enterprise could not escape the vigilant eyes of England and Germany, both mindful of the

course of sea power in history. The German emperor, seizing as a pretext a quarrel between his consul in the islands and a native king, laid claim to an interest in the Samoan group. England, aware of the dangers arising from German outposts in the southern seas so near to Australia, was not content to stand aside.

So it happened that all three countries sent battleships to the Samoan waters, threatening a crisis that was fortunately averted by friendly settlement. If, as is alleged, Germany entertained a notion of challenging American sea power then and there, the presence of British ships must have dispelled that dream.

The result of the affair was a tripartite agreement by which the three powers in 1889 undertook a **protectorate** over the islands. But joint control proved unsatisfactory. There was constant friction between the Germans and the English. The spheres of authority being vague and open to dispute, the plan had to be abandoned at the end of ten years. England withdrew altogether, leaving to Germany all the islands except Tutuila, which was ceded outright to the United States. Thus one of the finest harbors in the Pacific, to the intense delight of the American navy, passed permanently under American dominion. Another American triumph in diplomacy was set down to the credit of the State Department.

Cleveland and the Venezuela Affair

In relations with South America, as well as in those with the distant Pacific, the diplomacy of the government at Washington was put to the test. For some time, it had been watching a dispute between England and Venezuela over the western boundary of British Guiana and, on an appeal from Venezuela, it had taken a lively interest in the contest, which became known as the **Venezuela Affair**.

In 1895 President **Grover Cleveland** saw that Great Britain would yield none of her claims. After hearing the arguments of Venezuela, Cleveland's Secretary of State Richard T. Olney, in a note none too conciliatory, asked the British government whether it was willing to submit the points in controversy to arbitration. This inquiry he accompanied by a warning to the effect that the United States could not permit any European power to contest its mastery in this hemisphere. "The United States," said the secretary, "is practically sovereign on this continent and its fiat is law upon the subjects to which it confines its interposition . . . Its infinite resources, combined with its isolated position, render it master of the

situation and practically invulnerable against any or all other powers."

The reply evoked from the British government by this strong statement was firm and clear. The Monroe Doctrine, it said, even if not so widely stretched by interpretation, was not binding in international law; the dispute with Venezuela was a matter of interest merely to the parties involved; and arbitration of the question was impossible.

This response called forth President Cleveland's startling message of 1895. He asked Congress to create a commission authorized to ascertain by research the true boundary between Venezuela and British Guiana. He added that it would be America's duty "to resist by every means in its power, as a willful aggression upon its rights and interests, the **appropriation** by Great Britain of any lands or the exercise of governmental jurisdiction over any territory which, after investigation, we have determined of right belongs to Venezuela." The serious character of this statement he thoroughly understood. He declared that he was conscious of his responsibilities, intimating that war, much as it was to be deplored, was not comparable to "a supine submission to wrong and injustice and the consequent loss of national self-respect and honor."

The note of defiance which ran through this message, greeted by shrill cries of enthusiasm in many circles, was viewed in other quarters as a **portent** of war. Responsible newspapers in both countries spoke of an armed settlement of the dispute as inevitable. Congress created the commission and appropriated money for the investigation; a body of learned men was appointed to determine the merits of the conflicting boundary claims.

The British government, deaf to the clamor of the **bellicose** section of the London press, deplored the incident, courteously replied in the affirmative to a request for assistance in the search for evidence, and finally agreed to the proposition that the issue be submitted to arbitration.

The outcome of this somewhat perilous dispute contributed not a little to Cleveland's reputation as "a sterling representative of the true American spirit." This was not diminished when the tribunal of arbitration found that Great Britain was on the whole right in her territorial claims against Venezuela.

The Annexation of Hawaii

While engaged in the dangerous Venezuela controversy, President Cleveland was compelled by a

strange turn of events to consider the **Annexation of Hawaii** in the mid-Pacific. For more than half a century, American missionaries had been active in converting the indigenous inhabitants of the Hawaiian Islands to the Christian faith, and enterprising American businessmen had been developing the fertile sugar plantations. Both the Department of State and the Navy Department were fully conscious of the strategic relation of the islands to the growth of sea power and watched with anxiety any developments likely to bring them under some other dominion.

The country at large was indifferent, however, until 1893, when a revolution, headed by Americans, broke out after Queen **Liliuokalani** attempted to restore greater monarchical authority. This revolution by pro-American forces ended in the overthrow of the indigenous government, the abolition of the monarchy, and the forced retirement of the Queen to private life. This crisis was immediately followed by a demand from the new Hawaiian government for annexation to the United States.

President **Benjamin Harrison** looked with favor on the proposal, negotiated the treaty of annexation, and laid it before the Senate for approval. There it still rested when his term of office was brought to a close.

Harrison's successor, Cleveland, it was well known, had doubts about the **propriety** of

American action in Hawaii. For the purpose of making an inquiry into the matter, he sent a special commissioner to the islands. Based on the report of his agent, Cleveland reached the conclusion that "the revolution in the island kingdom had been accomplished by the improper use of the armed forces of the United States and that the wrong should be righted by a restoration of the Queen to her throne." Such being his matured conviction, though the facts upon which he rested it were disputed, he could do nothing but withdraw the treaty from the Senate and close the incident.

To the Republicans this sharp and **cavalier** disposal of their plans, carried out in a way that **impugned** the motives of a Republican president, was seen as nothing less than a betrayal of American interests. In their platform of 1896, they made clear their position: "Our foreign policy should be at all times firm, vigorous, and dignified and all our interests in the western hemisphere carefully watched and guarded. The Hawaiian Islands should be controlled by the United States, and no foreign power should be permitted to interfere with them." There was no mistaking this view of the issue. As the vote in the election gave popular sanction to Republican policies, Congress by a joint resolution, passed on July 6, 1898, annexed the islands to the United States and later conferred upon them the ordinary territorial form of government.

Lesson Two

History Overview and Assignments Cuba and the Spanish-American War

"Government is not a gift. Free government is not to be given by all the blended powers of earth and heaven. It is a birthright. It belongs, as our fathers said, and as their children said, as Jefferson said, and as President McKinley said, to human nature itself."

– US Senator George Frisbie Hoar

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the combined article: *Cuba and the Spanish War* and *American Policies in the Philippines and the Orient*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Do some outside research on the history of **Cuba** and prepare to share what you learn with your class.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Vocabulary

filch
malevolence
inveigh
recalcitrant
guerrilla warfare
quixotic
spoliation



This cartoon reflects the view of *Judge* magazine regarding America's imperial ambitions following McKinley's quick victory in the Spanish American War of 1898. The American flag flies from the Philippines and Hawaii in the Pacific to Cuba and Puerto Rico in the Caribbean.

Key People, Places, and Events

Cuba
William McKinley
Enrique Dupuy de Lôme
USS *Maine*
Spanish American War
George Dewey
Theodore Roosevelt
"Rough Riders"

Battle of San Juan Hill
West Indies
Filipino Revolt
Emilio Aguinaldo
Boer Wars
Meiji dynasty
Qing dynasty
First Sino-Japanese War

Boxer Rebellion
First Hague Conference
Permanent Court of Arbitration
First Pan-African Congress
1900 Paris Exposition
Pan-American Exposition
McKinley's Assassination

Discussion Questions

1. How was the United States drawn into the Cuban conflict?
2. Why do you think President McKinley ignored the final program of concessions presented by Spain regarding the war with Cuba?
3. What were the parameters and details regarding the resolution made by Congress regarding the war between Cuba and Spain?
4. What happened at the Battle of San Juan Hill? Which American military unit gained fame at this battle?
5. What were the final terms of peace after the war?
6. Describe England's attitude toward the war and its outcome.
7. In your opinion, was the US justified in initiating the Spanish-American War? Why or why not?
8. Give your opinion regarding the arguments presented by Senators Platt, Vest, and Hoar regarding the American acquisition of new territory.
9. What unforeseen results were produced by the Spanish American War?
10. How was American government received in the Philippines?
11. What happened in result?
12. Which country had control over the more global territory than any other by the end of the nineteenth century?
13. List the Southeast Asian regions with the European nations that controlled them by the end of the nineteenth century.
14. Why do you suppose China was defeated by Japan in the Sino-Japanese War?
15. What was the Boxer Rebellion, and how did the US respond?
16. Explain the policy of the "Open Door."
17. Who called the First Hague Conference, and for what purpose?
18. Where was the First Pan-African Congress held, and what were its purposes?
19. What was held the same year in France?
20. What innovation was particularly showcased at the Pan-American Exposition?
21. What sorrowful event occurred at this world's fair?

Adapted for High School from the book:
History of the United States
by Charles A. Beard and Mary R. Beard
Cuba and the Spanish War
and
American Policies in the Philippines and the Orient

President McKinley's Administration
Republican: 1897-1901
American Relations With Cuba

In 1897, in the midst of **Cuba's** struggle for independence from Spain, America's Republicans found themselves in a position to employ that "firm, vigorous, and dignified" foreign policy which they had approved in their platform. They declared: "The government of Spain having lost control of Cuba and being unable to protect the property or lives of resident American citizens or to comply with its treaty obligations, we believe that the government of the United States should actively use its influence and good offices to restore peace and give independence to the island."

The American property in Cuba to which the Republicans referred in their platform amounted in value by this time to more than fifty million dollars; the commerce with the island reached more than one hundred million annually; and the claims of American citizens against Spain for property destroyed totaled sixteen million. To the pleas of humanity which made such an effective appeal to the hearts of the American people, there were thus added practical considerations of great weight.

In the face of the swelling tide of popular opinion in favor of quick, drastic, and positive action, President **William McKinley** chose first the way of diplomacy. A short time after his inauguration he lodged with the Spanish government a dignified protest against its policies in Cuba, thus opening a game of thrust and parry with the suave ministers at Madrid.

The results of the exchange of notes included the recall of the obnoxious general the Spanish had in power, the appointment of a governor-general less bloodthirsty in his methods, a change in the policy of concentrating civilians in military camps, and finally a promise of "home rule" for Cuba.

There is no doubt that the Spanish government was eager to avoid a war that could have only one outcome. The American minister at Madrid, General Woodford, was convinced that firm and patient pressure would have resulted in the final surrender of Cuba by the Spanish government.

The de Lôme and the
Maine Incidents

Such a policy was defeated by events, however. In February 1898, a private letter written by Señor **Enrique Dupuy de Lôme**, the Spanish ambassador at Washington, expressing contempt for the President of the United States, was **filched** from the mails, and passed into the hands of a journalist, William R. Hearst, who published it to the world. In the excited state of American opinion, few gave heed to the grave breach of diplomatic courtesy committed by breaking open private correspondence. The Spanish government was compelled to recall de Lôme, thus officially condemning his conduct.

At this point a far more serious crisis put the peaceful relations of the two negotiating countries in dire peril. On February 15, the battleship **USS Maine**, riding in the harbor of Havana, was blown up and sunk, bringing about the deaths of 261 men. This tragedy, ascribed by the American public to the **malevolence** of Spanish officials, profoundly stirred an already furious nation.

When, on March 21, a commission of inquiry reported that the ill-fated ship had been blown up by a submarine mine which had in turn set off some of the ship's magazines, the worst suspicions seemed confirmed. If anyone was inclined to be indifferent to the Cuban war for independence, he was now met by the vehement cry: "Remember the *Maine*!"



This cartoon followed the explosion of the cruiser *Maine* in Havana harbor on February 15, 1898. King Alphonso XIII is shown playing with toy boats in Cuba and is about to suffer "Retribution." Victor Gillam, *Judge Magazine*, April 9, 1898

Spanish Concessions

Still the State Department, under McKinley's steady hand, pursued the path of negotiation, Spain proving more pliable and more ready with promises of reform in the island. Early in April, however, there came a decided change in the tenor of American diplomacy. On the 4th, McKinley, evidently convinced that promises did not mean performances, instructed the American minister at Madrid to warn the Spanish government that as no effective armistice had been offered to the Cubans, he would lay the whole matter before Congress.

This decision, everyone knew from the temper of Congress, meant war—a prospect which excited all the European powers. The Pope took an active interest in the crisis. France and Germany, foreseeing from long experience in world politics an increase of American power and prestige through war, sought to prevent it. Spain, hopeless and conscious of her weakness, at last dispatched to the President a note promising to suspend hostilities, to call a Cuban parliament, and to grant all the autonomy that could be reasonably asked.

President McKinley Calls For War

For reasons of his own—reasons which have never yet been fully explained—McKinley ignored the final program of concessions presented by Spain. At the very moment when his patient negotiations seemed to bear full fruit, he veered sharply from his course and launched the country into the war by sending to Congress his militant message of April 11, 1898.

Without making public the last note he had received from Spain, he declared that he was brought to the end of his effort and the cause was in the hands of Congress. Humanity, the protection of American citizens and property, the injuries to American commerce and business, the inability of Spain to bring about permanent peace in the island—these were the grounds for action that induced him to ask for authority to employ military and naval forces in establishing a stable government in Cuba. They were sufficient for a public already straining at the leash.

The Resolution of Congress

There was no doubt of the outcome when the issue was withdrawn from diplomacy and placed in charge of Congress. Resolutions were soon introduced into the House of Representatives authorizing the President to employ armed force in securing peace and order in the island and

“establishing by the free action of the people thereof a stable and independent government of their own.” To the form and spirit of this proposal the Democrats and Populists took exception. In the Senate, where they were stronger, their position had to be reckoned with by the narrow Republican majority.

As the resolution finally read, the independence of Cuba was recognized; Spain was called upon to relinquish her authority and withdraw from the island; and the President was empowered to use force to the extent necessary to carry the resolutions into effect. Furthermore, the United States disclaimed “any disposition or intention to exercise sovereignty, jurisdiction, or control over said island except for the pacification thereof.” Final action was taken by Congress on April 19, 1898, and approved by the President on the following day. The **Spanish American War** was begun.



Detail from *Charge of the 24th and 25th Colored Infantry, July 2nd, 1898*, depicting the Battle of San Juan Hill. 1899 lithograph by Chicago printers Kurz and Allison

War and Victory

Startling events then followed in swift succession. The Navy, as a result in no small measure of the alertness of Theodore Roosevelt, assistant secretary of the Department, was ready for the trial by battle. On May 1, Commodore **George Dewey** at Manila Bay shattered the Spanish fleet, marking the doom of Spanish dominion in the Philippines. On July 1, Colonel **Theodore Roosevelt's "Rough Riders"** (the 1st United States Volunteer Cavalry), gained fame during the **Battle of San Juan Hill**, in which the Spanish were routed by unmounted American cavalry forces after suffering heavy casualties.

On July 3, the Spanish fleet under Admiral

Cervera, in attempting to escape from Havana, was utterly destroyed by American forces under Commodore Schley. On July 17, Santiago on Cuba's southern coast, invested by American troops under General Shafter and shelled by the American ships, gave up the struggle.

On July 25 General Miles landed in Puerto Rico. In the **West Indies** too the Spaniards were beaten on land and sea, on August 13, General Merritt and Admiral Dewey carried Manila in the Philippines by storm. The war was over.

The Peace Protocol

Spain had already taken cognizance of stern facts. As early as July 26, acting through the French ambassador, Jules-Martin Cambon, the Madrid government approached President McKinley for a statement of the terms on which hostilities could be brought to a close. After some skirmishing, Spain yielded reluctantly to the ultimatum.

On August 12, 1898, the preliminary peace protocol was signed, stipulating that Cuba should be free, Puerto Rico ceded to the United States, and Manila occupied by American troops pending the formal treaty of peace. On October 1, the commissioners of the two countries met at Paris to bring about the final settlement.

Peace Negotiations and the Philippines

When the day for the first session of the conference arrived, the government at Washington apparently had not made up its mind on the final disposition of the Philippines. Perhaps, before the Battle of Manila Bay, not ten thousand people in the United States knew or cared where the Philippines were. Certainly, there was in the autumn of 1898 no decided opinion as to what should be done with the fruits of Dewey's victory. President McKinley doubtless voiced the sentiment of the people when he stated to the peace commissioners on the eve of their departure that there had originally been no thought of conquest in the Pacific.

The march of events, he added, had imposed new duties on the country. "Incidental to our tenure in the Philippines," he said, "is the commercial opportunity to which American statesmanship cannot be indifferent. It is just to use every legitimate means for the enlargement of American trade."

On this ground he directed the commissioners to accept not less than the cession of the island of Luzon, the chief of the Philippine group, with its harbor of Manila. It was not until the latter part of

October that he definitely instructed them to demand the entire archipelago, on the theory that the occupation of Luzon alone could not be justified "on political, commercial, or humanitarian grounds." This departure from the letter of the peace protocol was bitterly resented by the Spanish agents. It was with heaviness of heart that they surrendered the last sign of Spain's ancient dominion in the far Pacific.

The Final Terms of Peace

The treaty of peace, as finally agreed upon, embraced the following terms: the independence of Cuba; the cession of Puerto Rico, Guam, and the Philippines to the United States; the settlement of claims filed by the citizens of both countries; the payment of twenty million dollars to Spain by the United States for the Philippines; and the determination of the status of the inhabitants of the ceded territories by Congress.

The great decision had been made. Its issue was in the hands of the Senate where the Democrats and the Populists held the balance of power under the requirement of the two-thirds vote for ratification.

The Contest in America Over the Treaty of Peace

The publication of the treaty committing the United States to the administration of distant colonies directed the shifting tides of public opinion into two distinct channels: support for the policy and opposition to it. The trend in Republican leadership, long in the direction marked out by the treaty, now came into the open.

Perhaps a majority of the men highest in the councils of that party had undergone the change of heart reflected in the letters of John Hay, secretary of state. In August of 1898 he had hinted, in a friendly letter to Andrew Carnegie, that he sympathized with the latter's opposition to "imperialism"; but he had added quickly: "The only question in my mind is how far it is now possible for us to withdraw from the Philippines." In November of the same year he wrote to Whitelaw Reid, one of the peace commissioners at Paris: "There is a wild and frantic attack now going on in the press against the whole Philippine transaction. Andrew Carnegie really seems to be off his head . . . But all this confusion of tongues will go its way. The country will applaud the resolution that has been reached, and you will return in the role of conquering heroes with your 'brows bound with oak.'"¹

Senator Albert Beveridge of Indiana and Senator Orville Platt of Connecticut, accepting the verdict of history as the proof of manifest destiny, called for unquestioning support of the administration in its final step. “Every expansion of our territory,” said the latter, “has been in accordance with the irresistible law of growth. We could no more resist the successive expansions by which we have grown to be the strongest nation on earth than a tree can resist its growth. The history of territorial expansion is the history of our nation’s progress and glory. It is a matter to be proud of, not to lament. We should rejoice that Providence has given us the opportunity to extend our influence, our institutions, and our civilization into regions hitherto closed to us, rather than contrive how we can thwart its designs.”

This doctrine was savagely attacked by opponents of McKinley’s policy, many a staunch Republican joining with the majority of Democrats in denouncing the treaty as a departure from the ideals of the Republic. Senator George Vest introduced in the Senate a resolution that “under the Constitution of the United States, no power is given to the federal government to acquire territory to be held and governed permanently as colonies.” Senator George Frisbie Hoar of Massachusetts, whose long and honorable career gave weight to his lightest words, **inveighed** against the whole procedure and to the end of his days believed that the new drift into rivalry with European nations as a colonial power was fraught with genuine danger. “Our imperialistic friends,” he said, “seem to have forgotten the use of the vocabulary of liberty. They talk about giving good government. ‘We shall give them such a government as we think they are fitted for.’ ‘We shall give them a better government than they had before.’ Why, Mr. President, that one phrase conveys to a free man and a free people the most stinging of insults. In that little phrase, as in a seed, is contained the germ of all despotism and of all tyranny. Government is not a gift. Free government is not to be given by all the blended powers of earth and heaven. It is a birthright. It belongs, as our fathers said, and as their children said, as Jefferson said, and as President McKinley said, to human nature itself.”

The Senate, more conservative on the question of annexation than the House of Representatives (composed of men freshly elected in the stirring campaign of 1896), was deliberate about ratification of the treaty. The Democrats and Populists were especially **recalcitrant**.

Patriotism required ratification, it was said in one quarter. The country desires peace and the Senate ought not to delay, it was urged in another.

Finally, on February 6, 1899, the requisite majority of two-thirds was mustered, many a senator who voted for the treaty, however, sharing the misgivings of Senator Hoar as to the “dangers of imperialism.” Indeed, the senators passed a resolution declaring that the policy to be adopted in the Philippines was still an open question, leaving to the future, in this way, the possibility of retracing their steps.

The Attitude of England

The Spanish war, while accomplishing the simple objects of those who launched the nation on that course, like all other wars, produced results wholly unforeseen. In the first place, it exercised a profound influence on the drift of opinion among European powers.

In England, sympathy with the United States was from the first positive and outspoken. “The state of feeling here,” wrote Mr. Hay, then ambassador in London, “is the best I have ever known. From every quarter the evidences of it come to me. The royal family by habit and tradition are most careful not to break the rules of strict neutrality, but even among them I find nothing but hearty kindness and—so far as is consistent with propriety—sympathy. Among the political leaders on both sides, I find not only sympathy but a somewhat eager desire that ‘the other fellows’ shall not seem more friendly.”

Joseph Chamberlain, the distinguished liberal statesman, thinking no doubt of the continental situation, said in a political address at the very opening of the war that the next duty of Englishmen “is to establish and maintain bonds of permanent unity with our kinsmen across the Atlantic . . . I even go so far as to say that, terrible as war may be, even war would be cheaply purchased if, in a great and noble cause, the Stars and Stripes and the Union Jack should wave together over an Anglo-Saxon [i.e., anti-German and French] alliance.” To the American ambassador he added significantly that he did not “care a hang what they say about it on the continent,” which was another way of expressing the hope that the warning to Germany and France was sufficient. This friendly English opinion, so welcome to the United States, removed all fears as to the consequences of the war.

Henry Adams, recalling days of humiliation in London during the Civil War, when his father was the

American ambassador, coolly remarked that it was “the sudden appearance of Germany as the grizzly terror” that “frightened England into America’s arms”; but the net result in keeping the field free for an easy triumph of American arms was nonetheless appreciated in Washington where, despite outward calm, fears of European complications were never absent.

American Policies in the Philippines and the Orient, the Filipino Revolt against American Rule

In the sphere of domestic politics, as well as in the field of foreign relations, the outcome of the Spanish American War exercised a marked influence. It introduced at once problems of colonial administration and difficulties in adjusting trade relations with the outlying dominions. These were furthermore complicated in the very beginning by the outbreak of an insurrection against American sovereignty in the Philippines. The leader of the revolt, **Emilio Aguinaldo**, had been invited to join the American forces in overthrowing Spanish dominion, and he had assumed, apparently without warrant, that independence would be the result of the joint operations. When the news reached him that the American flag had been substituted for the Spanish flag, his resentment was keen.

In February 1899, there occurred a slight collision between his men and some American soldiers. The conflict thus begun was followed by serious fighting, which finally dwindled into a vexatious **guerrilla warfare** lasting three years and costing heavily in men and money. Atrocities were committed by the Filipino insurrectionists and, sad to relate, they were repaid in kind; it was argued in defense of the army that “the ordinary rules of warfare were without terror to men accustomed to fighting like savages.” In vain did McKinley assure the Filipinos that the institutions and laws established in the islands would be designed “not for our satisfaction or for the expression of our theoretical views, but for the happiness, peace, and prosperity of the people of the Philippine Islands.” Nothing short of military pressure could bring the warring revolutionists to terms.

“If we are to be a really great people, we must strive in good faith to play a great part in the world. We cannot avoid meeting great issues. All that we can determine for ourselves is whether we

shall meet them well or ill. In 1898 we could not help being brought face to face with the problem of war with Spain. All we could decide was whether we should shrink like cowards from the contest or enter into it as beseemed a brave and high-spirited people; and, once in, whether failure or success should crown our banners. So it is now.

We cannot avoid the responsibilities that confront us in Hawaii, Cuba, Porto Rico, and the Philippines. All we can decide is whether we shall meet them in a way that will redound to the national credit, or whether we shall make of our dealings with these new problems a dark and shameful page in our history. To refuse to deal with them at all merely amounts to dealing with them badly. We have a given problem to solve.”

– Theodore Roosevelt, “The Strenuous Life,” a speech before the Hamilton Club, Chicago, April 1899

Attacks on Republican “Imperialism”

The Filipino insurrection, following so quickly upon the ratification of the treaty with Spain, moved the American opponents of McKinley’s colonial policies to redouble their denunciation of what they were pleased to call “imperialism.” Senator Hoar was more than usually caustic in his indictment of the new course. The revolt against American rule only convinced him of the folly hidden in the first fateful measures. Everywhere he saw a conspiracy of silence and injustice. “I have failed to discover in the speeches, public or private, of the advocates of this war,” he contended in the Senate, “or in the press which supports it and them, a single expression anywhere of a desire to do justice to the people of the Philippine Islands, or of a desire to make known to the people of the United States the truth of the case. . . . The catchwords, the cries, the pithy and pregnant phrases of which their speech is full, all mean dominion. They mean perpetual dominion. . . . There is not one of these gentlemen who will rise in his place and affirm that if he were a Filipino he would not do exactly as the Filipinos are doing; that he would not despise them if they were to do otherwise. So much at least they owe of respect to the dead and buried history—the dead and buried history so far as they can slay and bury it—of their country.” In the way of practical suggestions, the Senator offered as a solution of the problem: the recognition of independence, assistance in establishing self-government, and an invitation to all powers to join in a guarantee of freedom to the islands.

The Republican Answer

To McKinley and his supporters, engaged in a sanguinary struggle to maintain American supremacy, such talk was more than **quixotic**; it was scarcely short of treasonable. They pointed out the practical obstacles in the way of uniform self-government for a collection of seven million people ranging in civilization from the most ignorant hill men to the highly cultivated inhabitants of Manila. The incidents of the revolt and its repression, they admitted, were painful enough; but still nothing as compared with the chaos that would follow the attempt of a people who had never had experience in such matters to set up and sustain democratic institutions. They preferred rather the gradual process of fitting the inhabitants of the islands for self-government. This course, in their eyes, though less poetic, was more in harmony with the ideals of humanity. Having set out upon it, they pursued it steadfastly to the end. First, they applied force without stint to the suppression of the revolt. Then they devoted such genius for colonial administration as they could command to the development of civil government, commerce, and industry.

State of World Affairs at the Turn of the Century

The nineteenth century had been a time of great upheaval and societal transformation on a global scale. The Industrial revolution had urbanized advanced societies, and slavery was outlawed in most nations. Empires such as the Spanish, Holy Roman, First French, Mughal, and Zulu Kingdom had collapsed. Meanwhile, the British, Russian, German, and Second French empires, along with the United States and Japan's Meiji dynasty, all rose in power. By the end of the century, Great Britain had supremacy, with control over one-fifth of the world's land and one-fourth of its people.

*By 1900, nearly all of Africa had been colonized by European powers—first in the northern regions for land, resources, and shipping bases; and then in the south, especially after diamonds were discovered in the Kimberley region and gold in the Transvaal. Between 1899 and 1902 the British fought the **Boer Wars**, establishing supremacy throughout this part of the continent.*

Southeast Asia was, by the end of the century, under European control, with the exception of Siam (now Thailand), which was still possessed by China. Great Britain had control of India, Ceylon, Burma (now Myanmar), the Malay States (including Singapore), and parts of Borneo and

New Guinea. The Netherlands controlled most of Indonesia. France had a large colony called French Indochina (now Vietnam, Cambodia, and Laos), and the US had gained the Philippines.

*Japan's **Meiji dynasty**, which had gained power through civil war in 1867 after trade concessions with the US sparked conflict, had been hard at work during the rest of the century, transforming the island nation into a major industrial power, adopting a Western style constitution, and establishing new educational, judicial, and military systems.*

*China's **Qing dynasty** suffered defeat to the Japanese in 1895 in the **First Sino-Japanese War**, prompting Western nations to demand more trade concessions. In retaliation against the government, a Chinese secret society at the turn of the century destroyed bridges and railroads and murdered Westerners and Chinese Christians in the **Boxer Rebellion**.*

The Boxer Rebellion in China

For a nation with a worldwide trade, steadily growing, as the progress of home industries redoubled the zeal for new markets, isolation for China was obviously impossible. Never was this clearer than in 1900 when a Chinese revolt against foreigners in China, known as the Boxer Rebellion, compelled the United States to join with the powers of Europe in a military expedition and a diplomatic settlement. A society called the Righteous and Harmonious Fists, known as the “Boxers” because of their practice of martial arts, had for some time carried on a campaign of hatred against all foreigners in the empire, calling upon the Chinese to rise in patriotic wrath and drive out the foreigners who, they said, “were lacerating China like tigers.” In the summer of 1900, the revolt flamed up in deeds of cruelty. Missionaries and traders were murdered in the provinces, foreign legations were stoned, the German ambassador was killed in the streets of Peking, and to all appearances a frightful war of extermination had begun. In the month of June nearly five hundred men, women, and children, representing all nations, were besieged in the British quarters in Peking under constant fire of Chinese guns and in peril of a terrible death.

Intervention in China

Nothing but the arrival of armed forces, made up of Japanese, Russian, British, American, French, and German soldiers and marines, prevented the destruction of the beleaguered foreigners. When

once the foreign troops were in possession of the Chinese capital, diplomatic questions of the most delicate character arose. For more than half a century, the imperial powers of Europe had been carving up China, taking to themselves territory, railway concessions, mining rights, ports, and commercial privileges at the expense of the huge but helpless victim. The United States alone among the great nations, while as zealous as any in the pursuit of peaceful trade, had refrained from seizing Chinese territory or ports. Moreover, the Department of State had been urging European countries to treat China with fairness, to respect her territorial integrity, and to give her equal trading privileges with all nations.

The American Policy of the “Open Door”

In the autumn of 1899, Secretary Hay had addressed to London, Berlin, Rome, Paris, Tokyo, and St. Petersburg his famous note on the “Open Door” policy in China. In this document he proposed that existing treaty ports and vested interests of the several foreign countries should be respected; that the Chinese government should be permitted to extend its tariffs to all ports held by alien powers except the few free ports; and that there should be no discrimination in railway and port charges among the citizens of foreign countries operating in the empire. To these principles the governments addressed by Mr. Hay finally acceded with evident reluctance.

American Dominions in the Pacific

On this basis he then proposed the settlement that had to follow the Boxer uprising. “The policy of the Government of the United States,” he said to the great powers in the summer of 1900, “is to seek a solution which may bring about permanent safety and peace to China, preserve Chinese territorial and administrative entity, protect all rights guaranteed to friendly powers by treaty and international law, and safeguard for the world the principle of equal and impartial trade with all parts of the Chinese Empire.” This was a friendly warning to the world that the United States would not join in a scramble to punish the Chinese by carving out more territory. “The moment we acted,” said Mr. Hay, “the rest of the world paused and finally came over to our ground.”

In taking this position, the Secretary of State did but reflect the common sense of America. “We are, of course,” he explained, “opposed to the dismemberment of that empire and we do not think

that the public opinion of the United States would justify this government in taking part in the great game of **spoliation** now going on.” Heavy damages were collected by the European powers from China for the injuries inflicted upon their citizens by the Boxers; but the United States, finding the sum awarded in excess of the legitimate claims, returned the balance in the form of a fund to be applied to the education of Chinese students in American universities. By pursuing a generous policy, Mr. Hay strengthened the hold of the United States upon the affections of the Chinese people and, in the long run, as he remarked himself, safeguarded “our great commercial interests in that Empire.”

Turn-of-the-Century Events

*In 1899, the **First Hague Conference**, which was the world’s first international diplomatic meeting called to develop multilateral treaties governing the conduct of war, was held in the Netherlands. This conference was called by Czar Nicholas II of Russia for the purpose of establishing a means of providing peaceful settlement of international disputes, but its success was limited by mutual distrust among the participating powers. One item that was established by this conference was the **Permanent Court of Arbitration**, an international arbitral tribunal that still functions today*

*In 1900 the **First Pan-African Congress** was held in London to combat racial injustice and encourage decolonization on the African continent. This conference was the first of many calling for international cooperation in the struggle to end colonial rule.*

*In the same year, the **1900 Paris Exposition world’s fair** was held along both banks of the Seine to celebrate the achievements of the nineteenth century and look forward to the twentieth. Pavilions displayed the innovations and advancements of forty countries. France was showcased as a major world power, and the French Art Nouveau style of art, décor, and architecture gained international acclaim.*

*In 1901, another world’s fair called the **Pan-American Exposition** was held in Buffalo, NY, with the theme of celebrating “commercial well-being and good understanding among the American Republics.” Buffalo was selected because of its large population and numerous railroad connections, and the exposition’s attractions were dazzlingly lit by alternating current power generated at nearby Niagara Falls.*

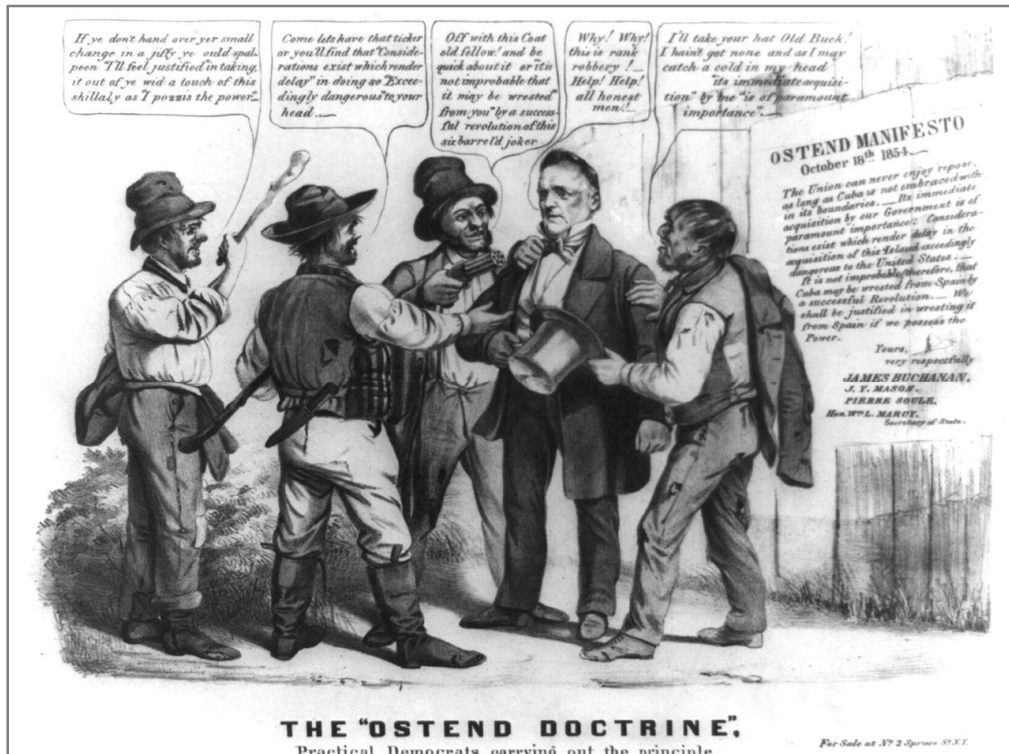
McKinley's Assassination

President William McKinley was reelected in 1900. On September 6 of the following year, he was shot on the grounds of the Pan-American Exposition in Buffalo, New York. He was shaking hands with the crowd when an anarchist named Leon Czolgosz shot him twice in the abdomen. The President died eight days later.

McKinley was the third American president to have been assassinated, following Abraham Lincoln in 1865 and James A. Garfield in 1881.



1900 Campaign poster: William McKinley ran on his record.



1856 US political cartoon depicting a gang of toughs taking James Buchanan's possessions in phrases reflecting the Ostend Manifesto's language advocating that the US take possession of Cuba



Pan-American Exhibition, panorama view, from *The Latest and Best Views of the Pan-American Exposition, Buffalo, NY*, by Robert Allen Reid (1901)

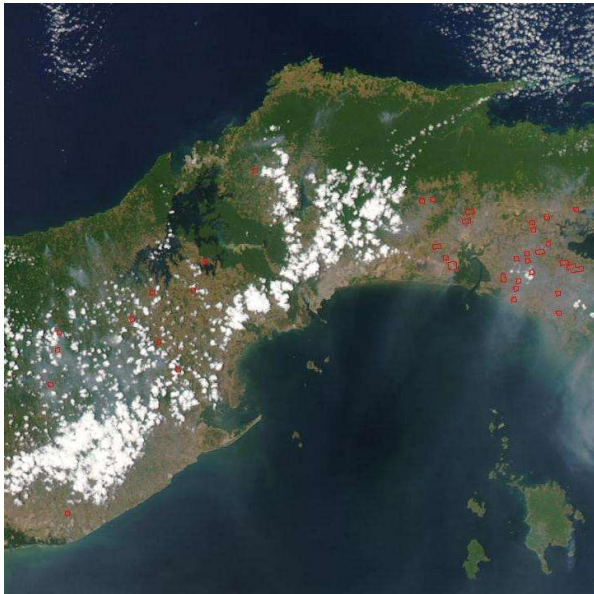
1. The term "brows bound with oak" is derived from Shakespeare's *Coriolanus*, Act 1, Scene 3.

The Artios Home Companion Series

Unit 10: Dawn of the Twentieth Century

Teacher Overview

WHEN “ROUGH & READY” Theodore Roosevelt became America’s youngest president at the age of 42 after William McKinley’s assassination, he launched an outspoken, action-packed Republican administration and became the driving force for America’s Progressive Era. Winning a landslide election to a full term in 1904, he is best known for his successes as champion of “Square Deal” economics, builder of the Panama Canal, broker of the Russo-Japanese peace agreement that ended their war and won him the 1906 Nobel Peace Prize, and for sending America’s naval fleet on an impressive world tour. Roosevelt chose his successor, William Howard Taft, but rifts developed between the two men, and Taft’s presidency was fraught with dissension and conflict.



Satellite image showing the location of Panama Canal:
Dense jungles are visible in green.
Jeff Schmalz, MODIS Rapid Response Team,
NASA/GSFC

Suggested Assignments

In this unit, students will:

- Complete three lessons in which they will learn about the **development of Republican politics, Theodore Roosevelt’s domestic policies, the rise of the Progressive Movement, the Taft administration, and the election of Woodrow Wilson**, journaling and answering discussion questions as they read.
- Do additional research to answer four discussion questions.
- Define vocabulary words.
- Complete a biography notebook page on **Theodore Roosevelt**.
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

Scripture addresses the Christian’s responsibility to government—to obey laws that do not violate Biblical principles.

Let every person be subject to the governing authorities. For there is no authority except from God, and those that exist have been instituted by God. Therefore whoever resists the authorities resists what God has appointed, and those who resist will incur judgment . . . Therefore one must be in subjection, not only to avoid God’s wrath but also for the sake of conscience. For because of this you also pay taxes, for the authorities are ministers of God, attending to this very thing. Pay to all what is owed to them: taxes to whom taxes are owed, revenue to whom revenue is owed, respect to whom respect is owed, honor to whom honor is owed.

– Romans 13:1-7

God created all human beings equal in His sight. Although we may have different and individual God-ordained purposes, God sees us as equal.

There is neither Jew nor Greek, there is neither slave nor free, there is no male and female, for you are all one in Christ Jesus.

– Galatians 3:28

Lesson One

History Overview and Assignments “Speak Softly and Carry a Big Stick”

“I have always been fond of the West African proverb: ‘Speak softly and carry a big stick; you will go far.’”

– Theodore Roosevelt, in a letter dated January 26, 1900



New Agua Clara locks (Atlantic side of the Panama Canal) in operation

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article: *The Evolution of Republican Politics*.
- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Do additional research to answer four of the discussion questions.
- Start a biography notebook page on **Theodore Roosevelt**.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Vocabulary

urbanity
acquiesce

Key People, Places, and Events

Theodore Roosevelt
Panama Canal
Hay-Pauncefote Treaty
Russo-Japanese War
Venezuelan Crisis

Roosevelt Corollary
Santo Domingo Affair
Hague Conference of 1907
Great White Fleet Tour

Organic Act of 1900
Platt Amendment
Wright brothers
Henry Ford

Discussion Questions

1. Compare the early career of Theodore Roosevelt with that of another US president of your choice.
 2. How were the boundary and fishery disputes settled with Great Britain and Canada?
 3. What international complications were involved in the Panama Canal problem?
 4. In your opinion, was the US justified in its interference in the Columbian rebellion while seeking land rights to construction of the Panama Canal?
 5. What is the strategic importance of the Caribbean region to the United States?
 6. What did the Hague Conference of 1907 seek to accomplish?
 7. What is meant by the question: “Does the Constitution follow the flag?”
- Do additional research for the following items:**
8. Review the Monroe Doctrine. Discuss Roosevelt’s expansion of this policy.
 9. Trace the voyage of the “Great White Fleet” around the world and list the important imperial and commercial points touched during this voyage.
 10. Briefly trace the history of self-government in Puerto Rico and the Philippines.
 11. When and where was the first successful motor-powered flight made?

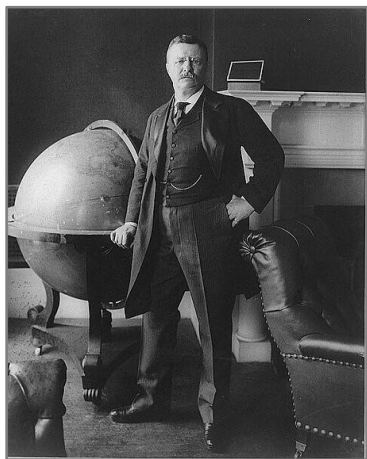
Adapted for High School from the book:
History of the United States
by Charles A. Beard and Mary R. Beard
The Evolution of Republican Policies
(1901-1913)

“The timid man, the lazy man, the man who distrusts his country, the over-civilized man, who has lost the great fighting, masterful virtues, the ignorant man, and the man of dull mind . . . all these, of course, shrink from seeing the nation undertake its new duties; shrink from seeing us build a navy and an army adequate to our needs; shrink from seeing us do our share of the world’s work, by bringing order out of chaos in the great, fair tropic islands from which the valor of our soldiers and sailors has driven the Spanish flag. These are the men who fear the strenuous life, who fear the only national life which is really worth leading.”

– Theodore Roosevelt

Theodore Roosevelt’s Administration
Republican: 1901-1909

When **Theodore Roosevelt** took the oath of office on September 14, 1901, after the death of William McKinley, the presidency passed to a new generation and a leader of a new type, recalling, if comparisons must be made, Andrew Jackson more than any Republican predecessor. Roosevelt was brusque, hearty, restless, and fond of action—“a young fellow of infinite dash and originality,” as Secretary of State John Hay remarked of him; combining the spirit of his old college, Harvard, with the breezy freedom of the plains; interested in everything—a new species of game, a new book, a diplomatic riddle, or a novel theory of history or biology. Though only forty-two years old, he was well versed in the art of practical politics.



Portrait of Theodore Roosevelt standing next to one of his favorite objects, a huge globe on which he used to put small white markers to show the position of American, German, and British navies in the Western Hemisphere.

Coming upon the political scene in the early 1880s, he had associated himself with the reformers in the Republican Party; but he was no *mugwump*

who abandons one’s political party. From the first he vehemently preached the doctrine of party loyalty; if beaten in the convention, he voted the straight ticket in the election. For twenty years he adhered to this rule, and during a considerable portion of that period he held office as a spokesman of his party. He served in the New York legislature, as head of the metropolitan police force, as federal civil service commissioner under President Harrison, as assistant secretary of the navy under President McKinley, and as governor of the Empire state (New York). Political managers of the old school spoke of him as “brilliant but erratic;” they soon found him equal to the shrewdest in negotiation and action.

FOREIGN AFFAIRS

Boundary Disputes

The Spanish American War had so thoroughly changed the relationship between the United States and the rest of the world that the conditions under which old problems were to be solved gave them entirely new aspects. The American people gradually began to take foreign affairs more seriously. As time went on, the government made improvements in its diplomatic services. Politicians found that threatening other countries had ceased to be profitable when public opinion realized what was at stake. Other countries, moreover, began to take the United States more seriously. The open hostility which they had shown on the first entrance of this nation into world politics changed, on second thought, to a desire on their part to placate and perhaps to win the support of this new and formidable power. It was, therefore, in an atmosphere by no means conducive to yielding on the part of the United States, though it was one not antagonistic to good feeling, that representatives of the two countries met.

The first question which pressed for settlement was one of boundary. It had already taken ninety years to draw the line from the Atlantic to the Pacific, and now the purchase of Alaska by the United States had added new uncertainties to the international boundary.

The discovery of gold on the Yukon in 1897 made this boundary question of practical importance. In 1899 the US and Great Britain agreed upon a *modus vivendi*, or compromised way of living, and in 1903 arranged an arbitration. The arbitrating board consisted of three members from each of the two nations.

Their decision was in accordance with the principle for which the United States had contended, though not following the actual line which it had sketched. It gave the Americans, however, full control of the coast and its harbors, and the settlement provided a mutually accepted boundary on every frontier.

With the discovery of gold in the far North, Alaska began a period of development which rapidly made that territory an important economic factor in American life. Today the time when this vast northern coast was valuable only as the breeding ground for the fur seal seems long past. Nevertheless, the fur seal continued to be sought, and for years the international difficulty of protecting the fisheries remained.

Finally, in 1911, the United States entered into a joint agreement with Great Britain, Japan, and Russia which served for practical purposes as a sort of international game law. The problems of Alaska that remained were therefore those of internal development.

Relations With Canada

Another source of international complication arose out of the Atlantic fisheries off Newfoundland, which was not yet part of Canada. It was off these shores that the most important deep-sea fishing took place during this era. This fishery was one of the earliest American sources of wealth, and for nearly two centuries it formed a sort of keystone of the whole commercial life of the United States. When in 1783 Great Britain recognized American independence, she recognized also that American fishermen had certain rights off these coasts. These rights, however, were not sufficient for the conduct of the fisheries, and so in addition certain "liberties" were granted, which allowed American fishers to land for the purpose of drying fish and of doing other things not generally permitted to foreigners. The rights were permanent, but the privileges were regarded as having lapsed after the War of

1812. In 1818 they were partially renewed, with certain limited privileges being conceded. Ever since that date, the problem of securing the additional privileges desired had been a subject for discussion between Great Britain and the United States.

In 1902 Secretary Hay arranged a new agreement with Sir Robert, Prime Minister of Newfoundland. This, however, the Senate rejected, and the earlier agreement continued. Newfoundland, angry at the rejection of the proposed treaty, put every obstacle possible in the way of American fishermen and used methods which the Americans claimed to be contrary to the treaty terms. After long and rather acrimonious discussions, the matter was finally referred in 1909 to The Hague Court. The court was asked not only to judge the facts, but also to draw up an agreement for the future. Its decision, on the whole, favored Newfoundland, but this fact is of little importance compared with the likelihood that a dispute almost a century and a half old was at last permanently settled.

— Adapted from *The Path of Empire: A Chronicle of the United States as a World Power*, by Carl Russell Fish

The Panama Canal

The most important foreign question confronting President Roosevelt on the day of his inauguration, that of the **Panama Canal**, was a heritage from his predecessor. The idea of a water route across the isthmus, long a dream of navigators, had become a living issue after the historic voyage of the battleship *Oregon* around South America during the Spanish-American War (moving the ship from San Francisco to Florida to join a blockade had required a voyage of 66 days). But before the United States could act it had to undo the Clayton-Bulwer Treaty, made with Great Britain in 1850, providing for the construction of the canal under joint supervision. This was finally effected by the **Hay-Pauncefote Treaty**, signed in 1901, which authorized the United States to proceed alone, on condition that there should be no discrimination against other nations in the matter of rates and charges.

This accomplished, it was necessary to decide just where the canal should be built. One group in Congress favored the route through Nicaragua; in fact, two official commissions had already approved that location. Another group favored cutting through Panama after purchasing the rights of the old French company, which had made a costly failure some twenty years before. After a heated argument over

the merits of the two plans, preference was given to the Panama route.



Location of Panama between Pacific (bottom) and Caribbean (top), with canal at top center

As Panama was then a part of Colombia, President Roosevelt proceeded to negotiate with the government at Bogota a treaty authorizing the United States to cut a canal through its territory. The treaty was easily framed, but it was rejected by the Colombian Senate, much to the President's exasperation. "You could no more make an agreement with the Colombian rulers," he exclaimed, "than you could nail jelly to a wall."

He was spared the necessity by a timely revolution. On November 3, 1903, Panama renounced its allegiance to Colombia and three days later the United States recognized Panama's independence, after having provided military support to the revolt.

This startling incident was followed shortly by the signature of a treaty between Panama and the United States in which the latter secured the right to construct the long-discussed canal, in return for a guarantee of independence and certain cash payments. The rights and property of the French concern were then purchased, and the final details settled.

A lock system rather than a sea-level canal was agreed upon. Construction by the government directly instead of by private contractors was adopted. Scientific medicine was summoned to stamp out the tropical diseases that had made Panama a plague spot.

Finally, in 1904, as the President said, "The dirt began to fly." After surmounting formidable difficulties—engineering, labor, and sanitary—the American forces in 1913 joined the waters of the Atlantic and the Pacific. Nearly eight thousand miles were cut off the sea voyage from New York to San Francisco. If any were inclined to criticize President Roosevelt for the way in which he snapped off negotiations with Colombia and recognized the Panama revolutionists, their attention was drawn to

the magnificent outcome of the affair. Notwithstanding the treaty with Great Britain, Congress passed a tolls bill discriminating in rates in favor of American ships. It was only on the urgent insistence of President Wilson later that the measure was repealed.

The Conclusion of the Russo-Japanese War

The applause which greeted the President's next diplomatic stroke was unmarred by censure of any kind. In the winter of 1904, there broke out between Japan and Russia a terrible conflict over the division of spoils in Manchuria. The fortunes of war were with the agile forces of Nippon (Japan). In this **Russo-Japanese War**, it seems, President Roosevelt's sympathies were mainly with the Japanese, although he observed the proprieties of neutrality. At all events, Secretary Hay wrote in his diary on New Year's Day, 1905 that the President was "quite firm in his view that we cannot permit Japan to be robbed a second time of her victory," referring to the fact that Japan, ten years before, after defeating China on the field of battle, had been forced by Russia, Germany, and France to forego the fruits of conquest.

Whatever the President's personal feelings may have been, he was aware that Japan, despite her triumphs over Russia, was staggering under a heavy burden of debt. At a suggestion from Tokyo, he invited both belligerents in the summer of 1905 to join in a peace conference. The rapidity of their reply was aided by the pressure of European bankers, who had already come to a mutual agreement that the war must stop. After some delay, Portsmouth, New Hampshire, was chosen as the meeting place for the spokesmen of the two warring powers.

Roosevelt presided over the opening ceremonies with fine **urbanity**, thoroughly enjoying the justly earned honor of being for the moment at the center of the world's interest. He had the satisfaction of seeing the conference end in a treaty of peace and amity.

The Venezuelan Crisis of 1902-03

Less spectacular than the Russo-Japanese settlement but not less important was a diplomatic feat of prowess with Germany over the Monroe Doctrine. This clash grew out of the inability or unwillingness of the Venezuelan government to pay debts due foreign creditors. Having exhausted their patience in negotiations, England and Germany in

December 1901 sent battleships to establish what they characterized as “a peaceful blockade” of Venezuelan ports. Their action was followed by the rupture of diplomatic relations; there was a possibility that war and the occupation of Venezuelan territory might result.



1903 caricature of Venezuelan president Cipriano Castro, by US cartoonist William Allen Rogers, published in the *New York Herald* (January 1903)

While unwilling to stand between a Latin American country and its creditors in this **Venezuelan Crisis**, President Roosevelt was determined that debt collecting should not be made an excuse for European countries to seize territory. He therefore urged arbitration of the dispute, winning the assent of England and Italy. Germany, with a somewhat haughty air, refused to take the milder course.

The President, learning of this refusal, called the German ambassador to the White House and informed him in very precise terms that, unless the Imperial German government consented to arbitration, Admiral Dewey would be ordered to the scene with instructions to prevent Germany from seizing any Venezuelan territory. A week passed and no answer came from Berlin. Undaunted, the President again took the matter up with the ambassador, this time with even more firmness; he stated in language admitting of only one meaning—that, unless within forty-eight hours Kaiser Wilhelm II consented to arbitration, American battleships, already coaled and cleared, would sail for Venezuelan waters.

The hint was sufficient. The German emperor accepted the proposal and Roosevelt, with the fine irony of diplomacy, complimented him publicly on “being so staunch an advocate of arbitration.”

In terms of the Monroe Doctrine this action meant that the United States, while not denying the obligations of debtors, would not permit any move on the part of European powers that might easily

lead to the temporary or permanent occupation of Latin American territory. The resulting policy became known as the **Roosevelt Corollary** to the Monroe Doctrine, which asserted that the United States possessed the right to intervene in order to stabilize the economic affairs of small states in the Caribbean and Central America if they were unable to pay their international debts, in order to preclude European intervention.

The Santo Domingo Affair

The same issue was involved in a controversy over Santo Domingo which arose in 1904. The Dominican Republic, like Venezuela, was heavily in debt, and certain European countries declared that, unless the United States undertook to look after the finances of the embarrassed debtor, they would resort to armed coercion. What was the United States to do? The danger of having some European power strongly entrenched so close by in Santo Domingo, the capital city, was too imminent to be ignored.

President Roosevelt acted in this **Santo Domingo Affair** with characteristic speed, and notwithstanding strong opposition in the Senate was able to effect a treaty arrangement in 1907 which placed Dominican finances under American supervision.

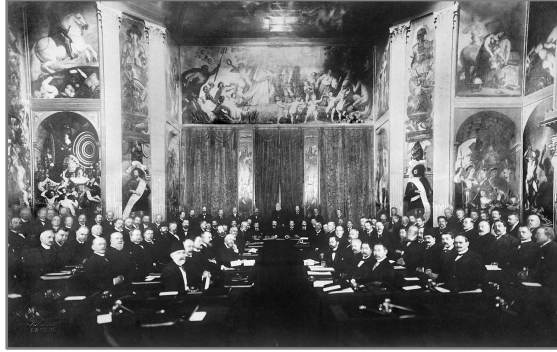
In the course of the debate over this settlement, a number of interesting questions arose. It was pertinently asked whether the American navy should be used to help creditors collect their debts anywhere in Latin America. It was also suggested that no sanction should be given to the practice among European governments of using armed force to collect private claims.

Opponents of President Roosevelt’s policy, and they were neither few nor insignificant, urged that such matters be settled by international arbitration. To this the answer was made that the United States could not surrender any question coming under the terms of the Monroe Doctrine to the decision of an international tribunal.

The position of the administration was very clearly stated by President Roosevelt himself. “The country,” he said, “would certainly decline to go to war to prevent a foreign government from collecting a just debt; on the other hand, it is very inadvisable to permit any foreign power to take possession, even temporarily, of the customs houses of an American republic in order to enforce the payment of its obligations; for such a temporary occupation might

turn into a permanent occupation. The only escape from these alternatives may at any time be that we must ourselves undertake to bring about some arrangement by which so much as possible of a just obligation shall be paid.”

The positive obligations resulting from the application of the Monroe Doctrine by the United States were points now emphasized and developed.



The Hague Convention of 1899, the world’s first international peace conference that sought to establish treaties for the governance of war

The Second Hague Conference

The controversies over Latin American relations and his part in bringing the Russo-Japanese War to a close, though, made a deep impression upon Roosevelt, turning his mind to new directions for the peaceful settlement of international disputes. Moreover, the subject was in the air. As if conscious of impending calamity, the statesmen of the Old World, to all outward signs at least, seemed to be searching for a way to reduce armaments and avoid the bloody and costly trial of settling international disputes by the ancient process of battle.

The First Hague Conference had done nothing to reduce military burdens or avoid wars, but it had established the Permanent Court of Arbitration at The Hague, the seat of government in the Netherlands, for the arbitration of international disputes.

Encouraged by this experiment, feeble as it was, President Roosevelt in 1904 proposed a second conference. At this great international assembly, the **Hague Conference of 1907**, the representatives of the United States proposed a plan for the compulsory arbitration of certain matters of international dispute. This was rejected with contempt by Germany. Reduction of armaments, likewise, proposed in the conference, was again deferred. In fact, nothing was accomplished beyond agreement upon certain rules for the conduct of “civilized warfare,” casting a somewhat lurid light

upon the “pacific” intentions of most of the powers assembled.

The Great White Fleet— Roosevelt’s “Big Stick” Ideology

As if to assure the world then that the United States placed little reliance upon the frail reed of peace conferences, Roosevelt the following year (1908) made an imposing display of American naval power by sending a fleet of sixteen battleships, called the **Great White Fleet**, on a tour around the globe. On his own authority, he ordered the ships to sail out of Hampton Roads in Virginia and circle the earth by way of the Straits of Magellan, San Francisco, Australia, the Philippines, China, Japan, and the Suez Canal.

This enterprise was not, as some critics claimed, a “mere boyish flourish.” President Roosevelt knew how deep the influence of sea power was on the fate of nations. He was aware that no country could have a wide empire of trade and dominion without force adequate to sustain it. The voyage around the world therefore served a double purpose. It interested his own country in the naval program of the government, and it reminded other powers that the American giant, though quiet, was not sleeping in the midst of international rivalries.

Roosevelt’s approach to foreign policy, illustrated in the following statement he made in 1900, was well demonstrated by this world tour: “I have always been fond of the West African proverb: ‘Speak softly and carry a big stick; you will go far.’”

COLONIAL ADMINISTRATION

A Constitutional Question Settled

In colonial administration, as in foreign policy, President Roosevelt advanced with firm step on a path already marked out. President McKinley had defined the principles that were to control the development of Puerto Rico and the Philippines. The Republican Party had announced a program of pacification, gradual self-government, and commercial improvement.

The only remaining question of importance, to use the popular phrase: “Does the Constitution follow the flag?” had been answered by the Supreme Court of the United States in its *Insular Cases* (which held that some but not all Constitutional rights extend to residents of US territories). Although it was well known that the Constitution did not anticipate the government of dependencies, such as the

Philippines and Puerto Rico, the Court, by generous and ingenious interpretations, found a way for Congress to apply reasonable rules required by the occasion.

Puerto Rico

The government of Puerto Rico was a relatively simple matter. It was a single island with a fairly homogeneous population apart from the Spanish upper class. For a time after military occupation in 1898, it was administered under military rule. This was succeeded by the establishment of civil government under the **Organic Act of 1900**. (Such an act establishes a US territory or an agency to govern certain federal lands). This law assured to the Puerto Ricans American protection but withheld American citizenship—a boon finally granted in 1917. It provided for a governor and six executive secretaries appointed by the President with the approval of the Senate; and for a legislature of two houses—one elected by popular residential vote, and an upper chamber composed of the executive secretaries and five other persons appointed in the same manner.

In result, the United States turned back to the provincial system maintained by England in Virginia or New York in old colonial days. The residents were given a voice in their government and the power of initiating laws; but the final word both in lawmaking and administration was vested in officers appointed in Washington. Such was the plan under which the affairs of Puerto Rico were conducted by President Roosevelt. It lasted until a new organic act was passed in 1917.

The Philippines

The administration of the Philippines presented far more difficult questions. The number of islands, the variety of languages and people groups, and the differences in civilization all combined to challenge the skill of the government. Moreover, there was raging in 1901 a stubborn revolt against American authority, which had to be faced. Following the lines laid down by President McKinley, the development of American policy fell into several stages. At first the islands were governed directly by the President under his supreme military power. In 1901 a civilian commission, headed by William Howard Taft, was selected by the President, and charged with the government of the provinces in which order had been restored.

Six years later, under the terms of an organic act

passed by Congress in 1902, the third stage was reached. The local government passed into the hands of a governor and commission, appointed by the President and Senate, and a legislature—one house elected by popular vote and an upper chamber composed of the commission. This scheme, like that functioning in Puerto Rico, remained intact until a Democratic Congress under President Wilson's leadership carried the colonial administration into its fourth phase by making both houses elective. Thus, by the steady pursuit of a liberal policy, self-government was extended to the dependencies; but it encouraged rather than extinguished the vigorous movement among the Philippine populace for independence.

Cuban Relations

Within the sphere of colonial affairs, Cuba, though nominally independent, also presented problems for the government at Washington. In the fine enthusiasm that accompanied the declaration of war on Spain, Congress, unmindful of practical considerations, recognized the independence of Cuba and disclaimed “any disposition or intention to exercise sovereignty, jurisdiction, or control over said island except for the pacification thereof.”

In the settlement that followed the war, however, it was deemed undesirable to set the young republic adrift upon the stormy sea of international politics without a guiding hand. Before withdrawing American troops from the island, Congress, in March 1901, enacted, and required Cuba to approve, a series of changes to her constitution known as the **Platt Amendment**, limiting her power to incur indebtedness, securing the right of the United States to intervene whenever necessary to protect life and property, and reserving to the United States coaling stations at certain points to be agreed upon.

The Cubans strongly protested what they deemed “infringements of their sovereignty,” but finally with good grace accepted their fate. Even when in 1906 President Roosevelt landed American troops on the island to quell a domestic dissension, they **acquiesced** to the action, evidently regarding it as a distinct warning that they should learn to manage their elections in an orderly manner.

Advances in Transportation

During the first decade of the twentieth century, two major advances took place in transportation. On December 17, 1903, the Wright brothers, Orville and Wilbur, made history

by flying the world's first successful motor-powered airplane, making a controlled, sustained flight over the breezy, sandy dunes at Kitty Hawk, North Carolina. In 1908, **Henry Ford** began mass-producing his famous Model T automobile. One of the first industries to use standardized parts, automated machines, and assembly-line production, Ford's production process revolutionized industrial manufacturing processes, and by 1913 his assembly line was able to produce a complete automobile in 93 minutes.



The first flight of the *Wright Flyer*, December 17, 1903, Orville piloting, Wilbur running at wingtip

Lesson Two

History Overview and Assignments The Roosevelt Domestic Policies

“From the day of his inauguration to the close of his service in 1909, President Theodore Roosevelt, in messages, speeches, and interviews, kept up a lively and interesting discussion about trusts, capital, labor, poverty, riches, law-breaking, good citizenship, and numerous kindred themes. Many a subject previously touched upon only by representatives of the minor and dissenting parties was dignified by his careful examination.”

– from the adapted article below



Theodore Roosevelt, official White House portrait, by John Singer Sargent (1903)

Suggested Reading and Assignments

- Review the discussion questions then read the article: *The Roosevelt Domestic Policies*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Continue your biography notebook page on **Theodore Roosevelt**.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

Square Deal
Reclamation Act of 1902
United States Forest Service
Progressive movement

Vocabulary

constructionism
progressivism

trade union
collective bargaining

deleterious

Discussion Questions

1. What were Roosevelt's three main goals for his Square Deal domestic policy?
2. What was Roosevelt's theory regarding the President's role with respect to the American Constitution?
3. Give Roosevelt's views on trusts, labor, and taxation.
4. Outline the domestic phases of Roosevelt's administration.
5. What great shift in governmental philosophy was brought about by the Progressive movement?
6. List some positive and negative effects of Progressivism.

Adapted for High School from the book:

History of the United States by Charles A. Beard and Mary R. Beard ***The Roosevelt Domestic Policies***

Social Questions to the Front

From the day of his inauguration to the close of his service in 1909, President Theodore Roosevelt, in messages, speeches, and interviews, kept up a lively and interesting discussion about trusts, capital, labor, poverty, riches, law-breaking, good citizenship, and numerous kindred themes. Many a subject previously touched upon only by representatives of the minor and dissenting parties was dignified by his careful examination. That he did this with any fixed design or policy in mind does not seem to be the case.

He admitted himself that when he became president, he did not have in hand any settled or far-reaching plan of social betterment. He did have, however, serious convictions on general principles. "I was bent upon making the government," he wrote, "the most efficient possible instrument in helping the people of the United States to better themselves in every way, politically, socially, and industrially. I believed with all my heart in real and thorough-going democracy, and I wished to make the democracy industrial as well as political, although I had only partially formulated the method, I believed we should follow." It is thus evident at least that he had departed a long way from the old idea of the government as nothing but a great policeman keeping order among the people in a struggle over the distribution of the nation's wealth and resources.

Roosevelt's View of the Constitution

Equally significant was Roosevelt's attitude toward the Constitution and the office of president. He utterly repudiated the constructionist view of our

national charter. **Constructionism** *disallows drawing inferences and encourages fidelity to the original intended meaning of the law.* Roosevelt held, on the contrary, that the Constitution "should be treated as the greatest document ever devised by the wit of man to aid a people in exercising every power necessary for its own betterment, not as a straight-jacket cunningly fashioned to strangle growth."

He viewed the presidency as he did the Constitution. Strict constructionists of the Jeffersonian school, of whom there were many on occasion even in the Republican party, had taken a view that the President could do nothing that he was not specifically authorized by the Constitution to do. Roosevelt took exactly the opposite position. It was his opinion that it was not only the President's right but his duty "to do anything that the needs of the nation demanded *unless* such action was forbidden by the Constitution or the laws." He went on to say that he acted "for the common well-being of all our people whenever and in whatever manner was necessary, unless prevented by direct constitutional or legislative prohibition." His domestic program, reflecting three major goals of corporate regulation, conservation of resources, and consumer protection, became known as the "**Square Deal.**"

The Trusts and Railways

To the business trust question Roosevelt devoted special attention. This was unavoidable. By far the larger part of the business of the country was conducted by corporations, as distinguished from partnerships and individual owners. The growth of

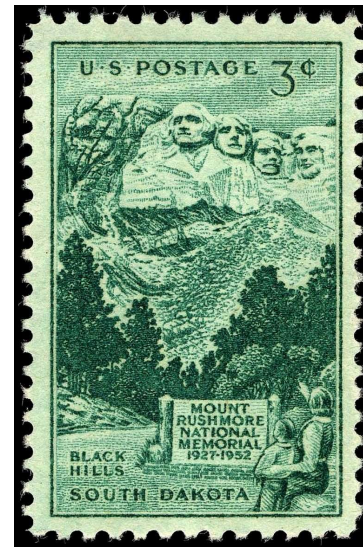
these gigantic aggregations of capital had been the leading feature in American industrial development during the last two decades of the nineteenth century. In the conquest of business by trusts and “the resulting private fortunes of great magnitude,” the Populists and the Democrats had seen a grievous danger to the Republic. “Plutocracy has taken the place of democracy; the tariff breeds trusts; let us destroy therefore the tariff and the trusts”—such was the battle cry which had been taken up by William Jennings Bryan and his followers.

President Roosevelt countered vigorously. He rejected the idea that the trusts were the product of the tariff or of governmental action of any kind. He insisted that they were the outcome of “natural economic forces”:

- 1) destructive competition among business-men compelling them to avoid ruin by cooperation in fixing prices,
- 2) the growth of markets on a national scale and even international scale, calling for vast accumulations of capital to carry on such business, and
- 3) the possibility of immense savings by the union of many plants under one management.

In the corporation, or large-scale company, he saw a new stage in the development of American industry. Unregulated competition he regarded as “the source of evils which all men concede must be remedied if this civilization of ours is to survive.” The notion, therefore, that these immense business concerns should be or could be broken up by a decree of law, Roosevelt considered absurd.

At the same time, he proposed that “evil trusts” should be prevented from “wrongdoing of any kind;” that is, punished for plain swindling, for making agreements to limit output, for refusing to sell to customers who dealt with rival firms, and for conspiracies with railways to ruin competitors by charging high freight rates and for similar abuses. Accordingly, he proposed, not the destruction of the trusts, but their regulation by the government. This, he contended, would preserve the advantages of business on a national scale while preventing the evils that accompanied it. The railway company he declared to be a public servant. “Its rates should be just and open to all shippers alike.” So, he answered those who thought that trusts and railway combinations were private concerns to be managed solely by their owners “without let or hindrance” and also those who thought trusts and railway combinations could be abolished by tariff reduction or criminal prosecution.



3-cent Mount Rushmore stamp, 1952. From left to right: George Washington, Thomas Jefferson, Theodore Roosevelt, and Abraham Lincoln

The Labor Question

On the labor question, then pressing to the front in public interest, President Roosevelt took advanced ground for his time. He declared that the working man, single-handed and empty-handed, threatened with starvation if unemployed, was no match for the employer who was able to bargain and wait.

This led him, accordingly, to accept the principle of the **trade union**; namely, that only by **collective bargaining** (negotiation between employers and groups of workers) can labor be put on a footing to measure its strength equally with capital. While he severely prosecuted labor leaders who advocated violence and destructive doctrines, he held that “the organization of labor into trade unions and federations is necessary, is beneficent, and is one of the greatest possible agencies in the attainment of a true industrial, as well as a true political, democracy in the United States.” The last resort of trade unions in labor disputes, the strike, he approved in case negotiations failed to secure “a fair deal.”

He thought, however, that labor organizations, even if wisely managed, could not solve all the pressing social questions of the time. The aid of the government at many points he believed necessary to eliminate undeserved poverty, industrial diseases, unemployment, and the unfortunate consequences of industrial accidents. In his first message of 1901, for instance, he urged that workers injured in industry should have certain and ample compensation. From time to time he advocated other legislation to obtain what he called “a larger measure of social and industrial justice.”

Great Riches and Taxation

Even the challenge of the radicals, such as the Populists, who alleged that “the toil of millions is boldly stolen to build up colossal fortunes for a few”—challenges which his predecessors did not consider worthy of notice—President Roosevelt refused to let pass without an answer. In his first message he denied the truth of the common saying that the rich were growing richer, and the poor were growing poorer. He asserted that, on the contrary, the average man, wage worker, farmer, and small businessman, was better off than ever before in the history of our country. That there had been abuses in the accumulation of wealth he did not pretend to ignore, but he believed that even immense fortunes, on the whole, represented positive benefits conferred upon the country. Nevertheless, he also felt that grave dangers to the safety and the happiness of the people lurked in great inequalities of wealth.

In 1906 he wrote that he wished it were in his power to prevent the heaping up of enormous fortunes. The next year, to the astonishment of many leaders in his own party, he boldly announced in a message to Congress that he approved both income and inheritance taxes, which were then generally viewed as Populist or Democratic measures. He even took the stand that such taxes should be laid in order to bring about a more equitable distribution of wealth and greater equality of opportunity among citizens.

LEGISLATIVE AND EXECUTIVE ACTIVITIES

Economic Legislation

When President Roosevelt turned from the field of opinion, he found himself in a different sphere. Many of his views were considered too progressive for the members of his party in Congress. **Progressivism** asserts that societal progress is restricted by economic inequality between the rich and the poor, and that governmental measures are necessary to address the resulting problems. Where results depended upon the making of new laws, Roosevelt’s progress was slow. Nevertheless, in his administrations several measures were enacted that bore the stamp of his theories, though it could hardly be said that he dominated Congress to the same degree as did some other presidents.

Two important pure food and drug laws, enacted in 1906, were designed to protect the public against diseased meats and **deleterious** foods and drugs. A

significant piece of labor legislation was an act of the same Congress making interstate railways liable to damages for injuries sustained by their employees. When this measure was declared unconstitutional by the Supreme Court, it was reenacted with the objectionable clauses removed. A second installment of labor legislation was offered in the law of 1908 limiting the hours of railway employees engaged as trainmen or telegraph operators.

Reclamation and Conservation

The open country—the deserts, forests, waterways, and the public lands—interested President Roosevelt no less than railway and industrial questions. Indeed, in his first message to Congress he placed the conservation of natural resources among “the most vital internal problems” of the age, and forcibly emphasized an issue that had been discussed in a casual way since Cleveland’s first administration. The suggestion evoked an immediate response in Congress.

Under the leadership of Senator Newlands of Nevada, the **Reclamation Act of 1902** was passed, providing for the redemption of the desert areas of the West. The proceeds from the sale of public lands were dedicated to the construction of storage dams and sluiceways to hold water and divert it as needed to the thirsty sands. Furthermore, it was stipulated that the rents paid by water users should go into a reclamation fund to continue the good work forever. Construction was started immediately under the terms of the law. Within seventeen years about 1,600,000 acres had been reclaimed and more than a million were actually irrigated. In the single year 1918, the crops of the irrigated districts were valued at approximately \$100,000,000.

In his first message, President Roosevelt also urged the transfer of all control over national forests to trained administrators in the Bureau of Forestry—a recommendation carried out in 1905 when the **United States Forest Service** was created. In every direction, noteworthy advances were made in the administration of the national domain. The science of forestry was improved, and knowledge of the subject was spread among the people. Lands in the national forest available for agriculture were opened to settlers. Waterpower sites on the public domain were leased for a term of years to private companies instead of being sold outright.

The area of the national forests was enlarged from 43 million acres to 194 million acres by presidential proclamation—more than 43 million

acres being added in one year, 1907. Those who turned sheep and cattle to graze on the public lands were compelled to pay a fair rental, much to their dissatisfaction. Fire prevention work was undertaken in the forests on a large scale, reducing the appalling, annual destruction of timber.

Millions of acres of coal land, such as the government had been carelessly selling to mining companies at low figures, were withdrawn from sale, and held until Congress was prepared to enact laws for their disposition in the public interest. Prosecutions were instituted against those who had obtained public lands by fraud, and vast tracts were recovered for the national domain. An agitation was begun which later bore fruit under the administrations of Taft and Wilson in laws reserving to the federal government the ownership of coal, waterpower, phosphates, and other natural resources while authorizing corporations to develop them under leases for a period of years.

The Prosecution of the Trusts

As an executive, President Roosevelt was also a distinct “personality.” His discrimination between “good” and “bad” trusts led him to prosecute some of them with vigor. On his initiative, the Northern Securities Company, formed to obtain control of certain great western railways, was dissolved by order of the Supreme Court. Proceedings were instituted against the American Tobacco Company and the Standard Oil Company as monopolies in violation of the Sherman Anti-Trust law. The Sugar Trust was found guilty of cheating the New York customs house, and some of the minor officers were sent to prison. Frauds in the Post Office Department were uncovered, and the offenders brought to book. In fact, hardly a week passed without stirring news of “wrongdoers” and “malefactors” hauled into federal courts.

The Great Coal Strike

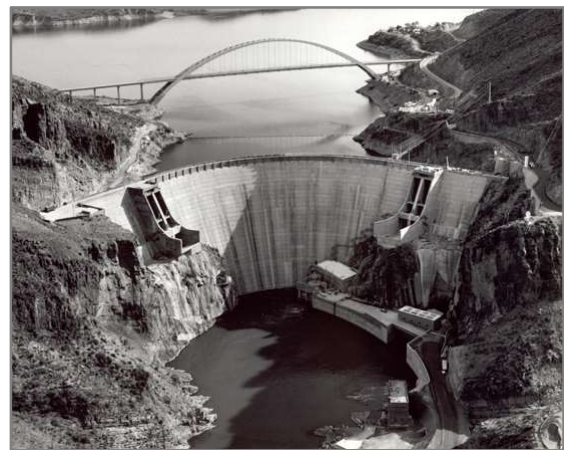
The Roosevelt theory that the President could do anything for public welfare not specifically forbidden by the Constitution and the laws was put to a severe test in 1902. A strike of the anthracite coal miners, which started in the summer, ran late into the autumn. Industries were paralyzed for the want of coal; cities were threatened with the appalling menace of a winter without heat. Governors and mayors were powerless and appealed for aid. The mine owners rejected the demands of the workers and refused to permit the arbitration of the points in

dispute, although John Mitchell, the leader of the miners, repeatedly urged it. After closely observing the course of affairs, President Roosevelt made up his mind that the situation was intolerable. He arranged to have federal troops, if necessary, take possession of the mines and operate them until the strike could be settled. He then invited the contestants to the White House. By dint of hard labor, he induced them to accept arbitration by a commission which he appointed, which required great concessions by the mine owners. Thus, by stepping outside the Constitution, President Roosevelt arguably averted a crisis of great magnitude. But at what cost? While his popularity increased among labor union leaders, his actions paved the way for greater and greater governmental control over business.

Progressivism

Progressive movement, with Roosevelt as its spokesman, took root during the early 20th century, seeking social and political reform through increases in governmental activity and regulation. Modern society clearly enjoys many great benefits of trade reforms, such as safer foods and work environments.

But how powerful should the government be allowed to grow? America was founded upon principles of limited government because her Founding Fathers were well familiar with the abuses of overly powerful governments. Progressive reformers felt confident that growth in governmental control could be managed and restricted by the people, but time has shown that increased regulation usually leads to more increases in regulation, as well as to the development of a bureaucratic structure that functions largely outside the realm of public control.



The Roosevelt Dam, Phoenix, Arizona, in 1996 after renovations were completed

Lesson Three

History Overview and Assignments The Administration of President Taft

THE DEMOCRAT LEADERS denounced President Roosevelt as erratic, dangerous, and radical and decided to assume the moderate role themselves by selecting as their candidate Judge Alton B. Parker of New York. This strategy did not work, and Parker's standing in the polls plummeted. Thus vindicated, Roosevelt became more outspoken than ever during his second term and helped to lay the groundwork for his successor, William H. Taft.



William Howard Taft, official White House portrait, by Anders Zorn (1911)

Key People, Places, and Events

William H. Taft
Sixteenth Amendment
Progressive Party
Woodrow Wilson

Vocabulary

vindicate

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article: *The Administration of President Taft*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Complete your biography notebook page on **Theodore Roosevelt**.
- Define the vocabulary word in the context of the reading. Write the word and its definition in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. Account for the dissensions under Taft.
2. What did the Sixteenth Amendment authorize?
3. What governmental body had previously ruled against this authorization?
4. Describe the progressive program Roosevelt advocated after his presidency.
5. Trace the development of the Progressive Party.
6. Review Wilson's early career and explain the underlying theory of *The New Freedom*.
7. Which party gained the presidency in the 1912 election? Why was this party able to gain victory for the first time in sixteen years?

Adapted for High School from the book:

History of the United States

by Charles A. Beard and Mary R. Beard

The Administration of President Taft

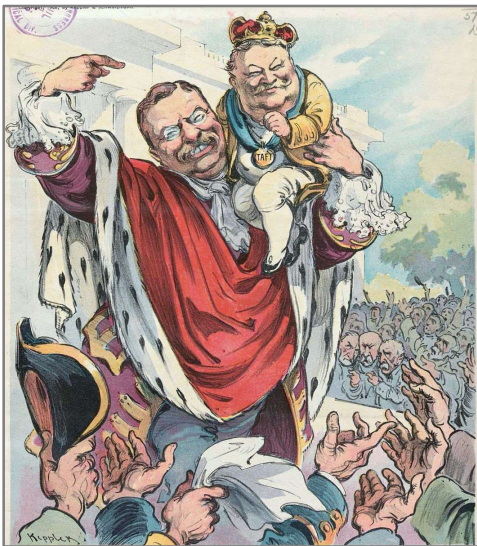
The Election of 1904

The views and measures which President Theodore Roosevelt advocated with such vigor aroused deep hostility both inside and outside of his

party. There were rumors of a Republican movement to defeat his nomination in 1904, and it was said that the "financial and corporation interests" were up in arms against him. A prominent Republican paper in

New York City accused him of having “stolen Mr. Bryan’s thunder” by harring the trusts and favoring labor unions. When the Republican convention assembled in Chicago, however, the opposition disappeared, and Roosevelt was nominated by acclamation.

This was the signal for a change on the part of Democratic leaders. They denounced the President as erratic, dangerous, and radical and decided to assume the moderate role themselves. They put aside William Jennings Bryan and selected as their candidate Judge Alton B. Parker of New York, a man who repudiated free silver and made a direct appeal for the conservative vote. The outcome of the reversal was astounding. Judge Parker’s vote fell more than a million below that cast for Bryan in 1900; of the 476 electoral votes he received only 140. Roosevelt, in addition to sweeping the Republican sections, even invaded Democratic territory, carrying the state of Missouri. Thus **vindicated** at the polls, he became more outspoken than ever during his second term—which was his first elective term (after having ascended to the presidency following McKinley’s 1901 assassination). His leadership in the party was so widely recognized that he virtually selected his own successor.



Puck magazine cover, August 1, 1906.
President Theodore Roosevelt introduces his chosen successor – his “crown prince,” Secretary of War William Howard Taft, to the cheering crowd.

THE ADMINISTRATION OF PRESIDENT TAFT

The Campaign of 1908

Long before the end of this elective term, President Roosevelt let it be known that he favored

as his successor **William Howard Taft** of Ohio, his secretary of war. To attain this end, he used every shred of his powerful influence. When the Republican convention assembled, Mr. Taft easily won the nomination. Though the party platform was conservative in tone, he gave it a progressive tinge by expressing his personal belief in the popular election of United States senators (rather than election by state legislatures as specified in the Constitution), an income tax, and other liberal measures. President Roosevelt announced his faith in the Republican candidate and appealed to the country for his election, and the 1908 victory went to Mr. Taft.

William Howard Taft’s Administration *Republican: 1909-1913*

At the very beginning of his term, President Taft had to face the tariff issue. He had met it in the campaign. Moved by the Democratic demand for a drastic reduction, he had expressed opinions which were thought to imply a “downward revision.” The Democrats made much of the implication, and the Republicans from the Midwest rejoiced in it. Pressure was coming from all sides.

More than ten years had elapsed since the Dingley Act of 1897 had become law, and the position of many industries had been altered with the course of time. Evidently the day for revision—at best a thankless task—had arrived. Taft accepted the inevitable and called Congress in a special session. Until the midsummer of 1909, Republican senators and representatives wrangled over tariff schedules, the President making little effort to influence their decisions. By August 5, when the Payne-Aldrich bill became a law, a breach had opened up within the Republican ranks. Powerful senators from the Midwest had spoken angrily against many of the high rates imposed by the bill. They had even broken with their party colleagues to vote against the entire scheme of tariff revision.

The Income Tax Amendment

The rift in party harmony was widened by another serious difference of opinion. During the debate on the tariff bill, there was a concerted movement to include in it an income tax provision—this in spite of the decision of the Supreme Court in 1895 declaring it unconstitutional. Conservative men were alarmed by the evident willingness of some members to flout a solemn decree of that eminent tribunal. At the same time they saw a powerful combination of Republicans and Democrats

determined upon shifting some of the burden of taxation to large incomes.

In the press of circumstances, a compromise was reached. The income tax bill was dropped for the present; but Congress passed the **Sixteenth Amendment** to the Constitution, authorizing taxes upon incomes from whatever source they might be derived, without reference to any apportionment among the states on the basis of population. The states ratified the amendment, and early in 1913 it was proclaimed.

President Taft's Policies

After the enactment of the tariff bill, Taft continued to push forward with his legislative program. He recommended, and Congress created, the United States Court of Commerce, a brief-lived federal trial court given jurisdiction, among other things, over appeals from the Interstate Commerce Commission, thus facilitating judicial review of the railway rates fixed and the orders issued by that body.

This measure was quickly followed by an act establishing a system of postal savings banks in connection with the post office—a scheme which had long been opposed by private banks. Two years later, Congress defied the lobby of the express companies and supplemented the savings banks with a parcel post system, thus enabling the American postal service to catch up with that of other progressive nations.

With a view to improving the business administration of the federal government, the President obtained from Congress a large appropriation to form the Commission on Economy and Efficiency, charged with the duty of inquiring into wasteful and obsolete methods and recommending improved devices and practices. The chief result of this investigation was a vigorous report in favor of a national budget system, which soon found public backing.

President Taft negotiated with England and France general treaties providing for the arbitration of disputes which were “justiciable” in character even though they might involve questions of “vital interest and national honor.” They were coldly received in the Senate and so amended that Taft abandoned them altogether. A tariff reciprocity agreement with Canada, however, he forced through Congress in the face of strong opposition from his own party. After making a serious breach in Republican ranks, he was chagrined to see the whole scheme come to naught

by the overthrow of the liberals in the Canadian elections of 1911.

Prosecution of the Trusts

The party schism was even enlarged by what appeared to be the successful prosecution of several large corporations. In two important cases, the Supreme Court ordered the dissolution of the Standard Oil Company and the American Tobacco Company on the ground that they violated the Sherman Anti-Trust law. In taking this step Chief Justice White was at some pains to state that the law did not apply to mergers which did not “unduly” restrain trade. His remark, construed to mean that the Court would not interfere with corporations as such, became the subject of a popular outcry against the President and the judges.

PROGRESSIVE INSURGENCY AND THE ELECTION OF 1912

Growing Dissensions

Overall, Taft's administration from the first day had been disturbed by party discord. Hot words had been exchanged over the tariff bill, and disgruntled members of Congress could not forget them. To differences over issues were added quarrels between youth and old age. In the House of Representatives there developed a group of young “insurgent” Republicans who resented the dominance of the Speaker, Joseph G. Cannon, and other members of the “old guard,” as they named the men of long service and conservative minds. In 1910, the insurgents went as far as to join with the Democrats in a movement to break the Speaker's sway by ousting him from the rules committee and depriving him of the power to appoint its members.

The storm was brewing. In the autumn of that year the Democrats won a clear majority in the House of Representatives and began an open battle with President Taft by demanding an immediate downward revision of the tariff.

The Rise of the Progressive Republicans

Preparatory to the campaign of 1912, the dissenters within the Republican Party added the prefix “Progressive” to their old title and began to organize a movement to prevent the renomination of Mr. Taft. As early as January 21, 1911, they formed a Progressive Republican League at the home of Senator La Follette of Wisconsin and launched an

attack on the Taft measures and policies. In October they endorsed Mr. La Follette as “the logical Republican candidate” and appealed to the party for support. The controversy over the tariff had grown into a formidable revolt against the occupant of the White House.

Roosevelt in the Field

After looking on for a while, ex-President Roosevelt took a hand in the fray. Soon after his return in 1910 from a hunting trip in Africa and a tour in Europe, he made a series of addresses in which he formulated a progressive program. In a speech in Kansas, he favored regulation of the trusts, a graduated income tax bearing heavily on great fortunes, tariff revision schedule by schedule, conservation of natural resources, labor legislation, the direct primary, and the recall of elective officials. In an address before the Ohio state constitutional convention in February 1912, he endorsed the initiative and referendum and announced a doctrine known as the “recall of judicial decisions.” This was a new and radical note in American politics. An ex-president of the United States was proposing that the people at the polls be given the right to reverse the decision of a judge who set aside any act of a state legislature passed in the interests of social welfare. The Progressive Republicans, impressed by these addresses, turned from La Follette to Roosevelt and on February 24, induced him to come out openly as a candidate against Taft for the Republican nomination.

The Split in the Republican Party

The country then witnessed the strange spectacle of two men who had once been close companions engaged in a bitter rivalry to secure a majority of the delegates to the Republican convention to be held in Chicago. When the convention assembled, about one-fourth of the seats were contested, the delegates for both candidates loudly proclaiming the regularity of their election. In deciding between the contestants, the national committee, after the usual hearings, settled the disputes in such a way that Taft received a safe majority.

After a week of negotiation, Roosevelt and his followers left the Republican Party. Most of his supporters withdrew from the convention, and the few who remained behind refused to answer the roll call. Undisturbed by this formidable bolt, the regular Republicans went on with their work. They

renominated Mr. Taft and put forth a platform roundly condemning such Progressive doctrines as the recall of judges.



Cartoon published in *Punch* (May 1912) on the Taft-Roosevelt quarrel, by Leonard Revaen-Hill

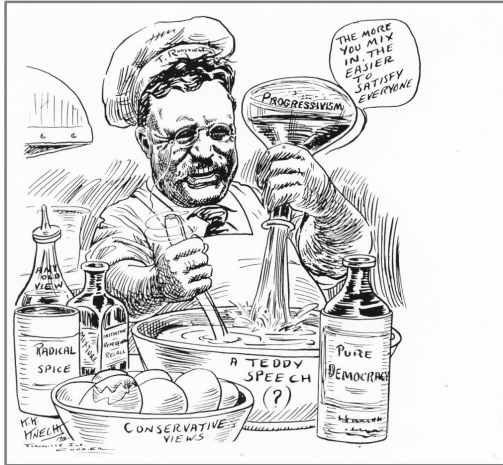
Formation of the Progressive Party

The action of the Republicans in seating the Taft delegates was vigorously denounced by Roosevelt. He declared that the convention had no claim to represent the voters of the Republican Party, that any candidate named by it would be “the beneficiary of a successful fraud,” and that it would be deeply discreditable to any man to accept the convention’s approval under such circumstances. The bitterness of his followers was extreme. On July 8, a call went forth for a “Progressive” convention to be held in Chicago on August 5.

The assembly of the new **Progressive Party** which duly met on that day was a unique political conference. Prominence was given to women delegates, and “politicians” were notably absent. Roosevelt himself, who was cheered as a conquering hero, made an impassioned speech setting forth his “confession of faith.” He was nominated by acclamation; Governor Hiram Johnson of California was selected as his companion candidate for vice president. The platform endorsed such political reforms as women’s suffrage, direct primaries, the initiative, referendum, and recall, popular election of United States senators, and the short ballot.

It favored a program of social legislation, including the prohibition of child labor and minimum wages for women. It approved the regulation, rather than the dissolution, of the trusts.

Like apostles in a new and lofty cause, the Progressives entered a vigorous campaign for the election of their distinguished leader.



Roosevelt “mixing ideologies” in his speeches in this 1912 editorial cartoon. Into a bowl labeled “A Teddy Speech,” Roosevelt pours Progressivism. Other ingredients near at hand include Conservative Views, Pure Democracy, and Radical Spice. “The more you mix in, the easier to satisfy everyone,” says Teddy cheerfully. Editorial cartoon by Karl K. Knecht (1883-1972) in *Evansville Courier*, Oct. 1912

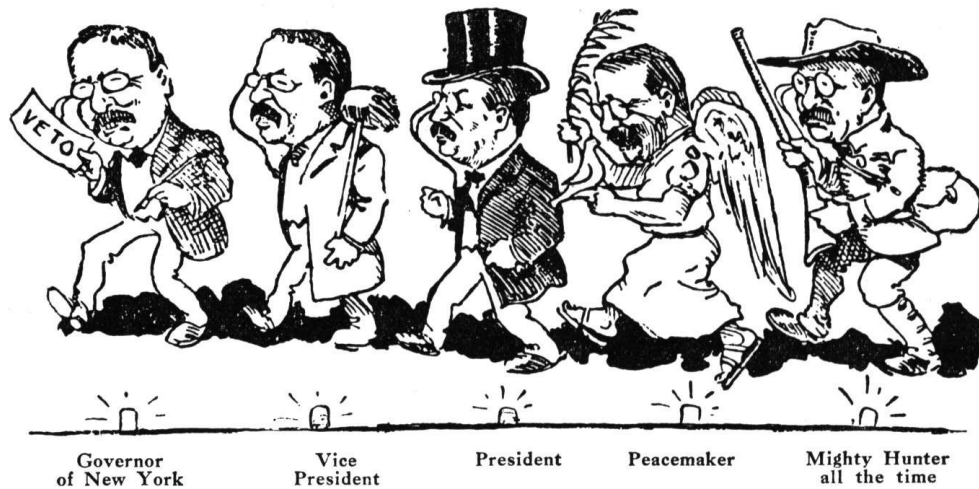
Woodrow Wilson and the Election of 1912

With the Republicans divided, victory loomed up before the Democrats. Naturally, a heated contest over the nomination occurred at their convention in Baltimore. Champ Clark, Speaker of the House of Representatives, and Governor **Woodrow Wilson** of New Jersey were the chief contestants. After tossing to and fro for seven long, hot days and taking forty-six ballots, the delegates, powerfully influenced by Mr. Bryan, finally decided in favor of the governor. As a professor, a writer on historical and political subjects, and the president of Princeton

University, Mr. Wilson had become widely known in public life. As the governor of New Jersey, he had attracted the support of the progressives in both parties. With grim determination he had “waged war on the bosses” and pushed through the legislature measures establishing direct primaries, regulating public utilities, and creating a system of workmen’s compensation in industries.

During the presidential campaign that followed, Governor Wilson toured the country and aroused great enthusiasm by a series of addresses later published under the title of *The New Freedom*. He declared that “the government of the United States is at present the foster child of the special interests.” He proposed to free the country by breaking the dominance of “the big bankers, the big manufacturers, the big masters of commerce, and the heads of railroad corporations and of steamship corporations.”

In the election Governor Wilson easily secured a majority of the electoral votes, and his party, while retaining possession of the House of Representatives, captured the Senate as well. The popular verdict, however, indicated a state of confusion in the country. The combined Progressive and Republican vote exceeded that of the Democrats by 1,300,000. The Socialists, with Eugene V. Debs as their candidate again, polled about 900,000 votes, more than double the number received four years before. Thus, as the result of an extraordinary upheaval and split, the Republicans, after holding the office of president for sixteen years, passed out of power, and the government of the country was entrusted to the Democrats under the leadership of a man destined to be one of the outstanding figures of the next age, Woodrow Wilson.



Political cartoon showing the many roles Theodore Roosevelt filled during his lifetime, by William Charles Morris

The Artios Home Companion Series

Unit 11: The Spirit of Reform in America

Teacher Overview

THE OUTCRY AGAINST corruption which triggered the liberal Republican movement in the 1870s and the “mugwump” tendencies of the 1880s spurred an outbreak of open criticism of American government from all corners. The vitriol became so savage that the opening years of the twentieth century were well named “the age of the muckrakers.” A mark of the success of America’s democratic process, however, was that unlike in other types of nations, the outcry produced reform rather than revolution.



McClure's Magazine published many early muckraker articles.

Suggested Assignments

In this unit, students will:

- Complete two lessons in which they will learn about the **spirit of reform in America**, journaling and answering discussion questions as they read.
- Define vocabulary words.
- Write an essay.
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

God honors integrity and despises corruption.

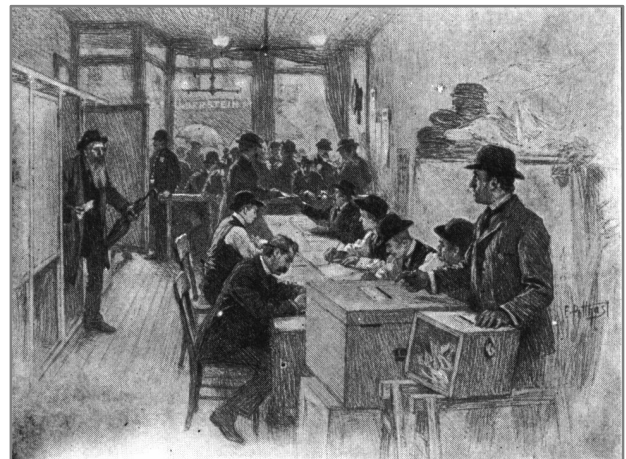
A good name is to be chosen rather than great riches, and favor is better than silver or gold. The rich and the poor meet together; the Lord is the Maker of them all. The prudent sees danger and hides himself, but the simple go on and suffer for it. The reward for humility and fear of the Lord is riches and honor and life. Thorns and snares are in the way of the crooked; whoever guards his soul will keep far from them.

– Proverbs 22:1-5

God wants us to be unselfish.

Do nothing from selfish ambition or conceit, but in humility count others more significant than yourselves. Let each of you look not only to his own interests, but also to the interests of others.

– Philippians 2:3-4



New York polling place c.1900, showing voting booths on the left. Illustration in *History of the United States*, by E. Benjamin Andrews (1912)

Lesson One

History Overview and Assignments American Spirit of Reform

“The revolt against corruption in politics which produced the Liberal Republican outbreak in the seventies and the ‘mugwump’ movement of the eighties was followed by continuous criticism of American political and economic development.”

– from the adapted article below



Ida M. Tarbell

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article:
The Spirit of Reform in America.
- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Begin writing an essay evaluating humanity’s need for laws, in light of its continual failure to live by the principles outlined in this unit’s Leading Ideas.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Vocabulary

invective	salutary	obdurate	recall election
imputation	conclave	initiative	commissioner
merit system	direct primary	referendum	prerogative
competent	ardent	direct democracy	city manager

Key People, Places, and Events

Henry D. Lloyd	Winston Churchill	Elihu Root
Ida Tarbell	Upton Sinclair	Seventeenth Amendment

Discussion Questions

1. Who were some of the critics of abuses in American life?
2. What criticisms were advanced?
3. Discuss the use of criticism as an aid to progress in a democracy.
4. Explain what is meant by the “merit system” in the civil service.
5. What were the two main objectives of public service reform?
6. Describe the Australian ballot and the abuses against which it was directed.
7. Trace the history of popular election of senators.
8. What arguments were made by each side on this question?
9. Describe the initiative and referendum processes.
10. Briefly describe the history of the direct primary process, commission government, and the city manager plan.
11. Discuss the potential advantages and disadvantages of direct democracy and representative democracy.

Adapted for High School from the book:
History of the United States
by Charles A. Beard and Mary R. Beard
The Spirit of Reform in America

“We must demand the highest order of integrity and ability in our public men who are to grapple with these new problems. We must hold to a rigid accountability those public servants who show unfaithfulness to the interests of the nation or inability to rise to the high level of the new demands upon our strength and our resources.”

– Theodore Roosevelt

AN AGE OF CRITICISM

Attacks on Corruption

The crisis precipitated by the Progressive uprising was not a sudden and unexpected one. It had been long in preparation. The revolt against corruption in politics which had produced the Liberal Republican outbreak in the seventies and the “mugwump” party abandonment movement of the eighties was followed by continuous criticism of American political and economic development.

From 1880 until his death in 1892, George William Curtis, as president of the Civil Service Reform Association, kept up a running fire upon the abuses of the spoils system. James Bryce, an observant English scholar and political figure, gave the whole country a fresh shock in his great work, *The American Commonwealth*, published in 1888, by fearlessly depicting the political rings and machines which dominated the cities. Six years later journalist **Henry D. Lloyd**, in a powerful book entitled *Wealth Against Commonwealth*, attacked in scathing language certain trusts which had destroyed their rivals and bribed public officials. In 1903 **Ida Tarbell**, an author of established reputation in the historical field, wrote for *McClure’s Magazine* and gave to the public *The History of the Standard Oil Company*, revealing the ruthless methods employed by that corporation to crush competition. About the same time, reporter Lincoln Steffens exposed the sordid character of politics in several municipalities in a series of articles bearing the painful heading: *The Shame of the Cities*.

The critical spirit appeared in almost every form; in weekly and monthly magazines, in essays and pamphlets, in editorials and news stories, in novels like (American writer) **Winston Churchill’s** *Coniston* and **Upton Sinclair’s** *The Jungle*. The criticism became so savage and so wanton that the opening years of the twentieth century were well named “the age of the muckrakers.”

Muckraker

The term “muckraker” is derived from John Bunyan’s classic story *The Pilgrim’s Progress*, in which the “Man with the Muck-rake” could look no way except downward, rejecting salvation to obsess about filth.

The Subjects of Criticism

In this outburst of **invective**, nothing was spared. It was charged that each of the political parties had fallen into the hands of professional politicians who devoted their time to managing conventions, developing platforms, nominating candidates, and dictating to officials; in return for their “services” they sold offices and privileges.

It was alleged that mayors and councils had bargained away for private benefit street railways and other franchises. It was asserted that many powerful labor unions were dominated by men who blackmailed employers. Some critics specialized in descriptions of the poverty, slums, and misery of great cities. Others took up “frenzied finance” and accused financiers of selling worthless stocks and bonds to an innocent public. Still others professed to see in the accumulations of millionaires the downfall of the American republic.

The Attack on “Invisible Government”

Some even maintained that the control of public affairs had passed from the people to a sinister minority called “the invisible government.” So eminent and conservative a statesman as the Honorable **Elihu Root**, formerly Roosevelt’s secretary of state, lent the weight of his great name to such an **imputation**. Speaking of his native state, New York, he said: “What is the government of this state? What has it been during the forty years of my acquaintance with it? The government of the Constitution? Oh, no; not half the time or halfway. . . . From the days of Fenton and Conkling

and Arthur and Cornell and Platt, from the days of David B. Hill down to the present time, the government of the state has presented two different lines of activity: one of the constitutional and statutory officers of the state and the other of the party leaders; they call them party bosses. They call the system—I don't coin the phrase—the system they call 'invisible government' . . . The ruler of the state during the greater part of the forty years of my acquaintance with the state government has not been any man authorized by the constitution or by law. . . . The party leader is elected by no one, accountable to no one, bound by no oath of office, removable by no one."

The Nation Aroused

With the spirit of criticism came the spirit of reform. The charges were usually exaggerated, often wholly false; but there was enough truth in them to warrant renewed vigilance on the part of American democracy. President Roosevelt doubtless summed up the sentiment of the great majority of citizens when he demanded the punishment of wrongdoers in 1907, saying: "It makes not a particle of difference whether these crimes are committed by a capitalist or by a laborer, by a leading banker or manufacturer or railroad man or by a leading representative of a labor union. Swindling in stocks, corrupting legislatures, making fortunes by the inflation of securities, by wrecking railroads, by destroying competitors through rebates—these forms of wrongdoing in the capitalist are far more infamous than any ordinary form of embezzlement or forgery." The time had come, he added, to stop "muckraking" and proceed to the constructive work of removing the abuses that had developed.

POLITICAL REFORMS

The Public Service

It was a wise comprehension of the needs of American democracy that led the friends of reform to launch and sustain for more than half a century a movement to improve the public service. On the one side they struck at the spoils system—at the practice of politicians to distribute public offices as rewards for partisan work.

The Pendleton Civil Service Reform Act of 1883 had opened the way to reform by establishing five vital principles in law:

1) admission to office, not on the recommendation of

- party workers, but on the basis of competitive examinations;
- 2) promotion for meritorious service of the government rather than of parties;
 - 3) no assessment of office holders for campaign funds;
 - 4) permanent tenure during good behavior; and
 - 5) no dismissals for political reasons.

The act itself at first had applied to only 14,000 federal offices, but under the constant pressure from the reformers it was extended until by 1916 it covered nearly 300,000 employees out of an executive force of approximately 414,000. While gaining steadily at Washington, civil service reformers carried their agitation into the states and cities. By 1920 they were able to report ten states with civil service commissions and the **merit system** well entrenched in more than three hundred municipalities.

In excluding spoilsmen from public office, the reformers were, in a sense, engaged in a negative work: that of "keeping the rascals out." But there was a second and larger objective to their movement, one constructive in character: that of getting skilled, loyal, and efficient servants into places of responsibility.

Everywhere on land and sea, in town and country, new burdens were laid upon public officers. They were called upon to supervise the ships sailing to and from American ports; to inspect the water and milk supplies of American cities; to construct and operate great public works, such as the Panama and Erie canals; to regulate the complicated rates of railway companies; to safeguard health and safety in a thousand ways; to climb the mountains to fight forest fires; and to descend into the deeps of the earth to combat the deadly coal gases that assail the miners.

In a word, those who labored to master the secrets and the powers of nature were summoned to the aid of the government: chemists, engineers, architects, nurses, surgeons, foresters—those skilled in all the sciences, arts, and crafts.

Keeping rascals out was no task at all compared with the problem of finding **competent** people for all the technical offices. "Now," said the reformers, "we must make attractive careers in the government work for the best American talent; we must train those applying for admission and increase the skill of those already in positions of trust; we must see to it

that those entering at the bottom have a chance to rise to the top; in short, we must work for a government as skilled and efficient as it is strong, one commanding all the wisdom and talent of America that public welfare requires.”

The Secret Ballot

A second line of attack on the political machines called for expanded use of the Australian (secret) ballot.

In America’s early days elections were frequently held in the open air, and the poll was taken by a show of hands or by the enrollment of the voters under names of their favorite candidates.

When this ancient practice was abandoned in favor of the printed ballot, there was still no secrecy about elections. Each party prepared its own ballot, often of a distinctive color, containing the names of its candidates. On Election Day, these papers were handed out to the voters by party workers. Anyone could tell from the color of the ballot dropped into the box, or from some mark on the outside of the folded ballot, just how each man voted. Those who bought votes could be sure that their purchases were “delivered.” Those who intimidated voters could know when their intimidation was effective. In this way the party ballot strengthened the party machine.

As a remedy for such abuses, reformers, learning from the experience of Australia, had urged the adoption of the Australian ballot. That ballot, though it appeared in many forms, had certain consistent features. It was official, that is, furnished by the government, not by party workers; it contained the names of all candidates of all parties; it was given out only in the polling places; and it was marked in secret.

The first state to introduce the secret ballot was Massachusetts. The year was 1888. By the end of the century, it had been adopted by nearly all the states in the Union. The **salutary** effect of the reform in reducing the amount of cheating and bribery in elections was beyond all question.

The Direct Primary

In connection with the uprising against machine politics came a call for the abolition of the old method of nominating candidates by conventions. These time-honored party assemblies, which had come down from the days of Andrew Jackson, were, it was said, merely **conclaves** of party workers, sustained by the spoils system and dominated by an inner circle of bosses.

The remedy offered in this case was again “more democracy,” namely, the abolition of the party convention and the adoption of the **direct primary**. Candidates were no longer to be chosen by secret conferences. Any member of a party was to be allowed to run for any office, to present his name to his party by securing signatures to a petition, and to submit his candidacy to his fellow partisans at a direct primary—an election within the party.

In this movement Wisconsin took the lead, and this state was the first in the Union to adopt the direct primary for statewide purposes. The idea spread, rapidly in the West, more slowly in the East. The public, already angered against “the bosses,” grasped eagerly at it. Governor Hughes in New York pressed it upon the unwilling legislature. State after state accepted it until by 1918 Rhode Island, Delaware, Connecticut, and New Mexico were the only states that had not bowed to the storm. Still, the results were disappointing, and at that very time the pendulum was beginning to swing backward.

The Seventeenth Amendment

While the movement for direct primaries was still advancing everywhere, a demand for the popular election of US senators, usually associated with it, swept forward to victory.

Under the original Constitution, it had been expressly stated that federal senators should be chosen by the legislatures of the states. In practice this rule transferred the selection of senators to secret caucuses of party members in the state legislatures. In connection with these caucuses there had been many scandals, some direct proofs of brazen bribery and corruption, and dark hints besides. The Senate was called by its detractors “a millionaires’ club,” and it was looked upon as the “citadel of conservatism.” The prescription in this case was likewise “more democracy”—direct election of senators by popular vote.

This reform was not a new idea. It had been proposed in Congress as early as 1826. President Andrew Johnson, an **ardent** advocate, made it the subject of a special message in 1868. Not long afterward, it appeared in Congress. Finally in 1893, the year after the great Populist upheaval, the House of Representatives by the requisite two-thirds vote incorporated it into an amendment to the federal Constitution. Again and again it passed the House; but the Senate itself was **obdurate**. Able senators leveled their batteries against it. Senator George Frisbie Hoar of Massachusetts declared that it would

transfer the seat of power to the “great cities and masses of population;” that it would “overthrow the whole scheme of the Senate, and in the end the whole scheme of the national Constitution as designed and established by the framers of the Constitution and the people who adopted it.”

Failing in the Senate, advocates of popular election made a rear assault through the states. They induced state legislatures to enact laws requiring the nomination of candidates for the Senate by the direct primary, and then they bound the legislatures to abide by the popular choice. Nevada took the lead in 1899. Shortly afterward, Oregon practically bound legislators to accept the popular nominee, and the country witnessed the spectacle of a Republican legislature “electing” a Democrat to represent the state in the Senate at Washington.

By 1910 three-fourths of the states had applied the direct primary in some form to the choice of senators. Men selected by that method began to pour in upon the floors of Congress; finally in 1912 the two-thirds majority was secured for the **Seventeenth Amendment** to the federal Constitution, providing for the popular election of senators. It was quickly ratified by the states. The following year it was proclaimed in effect.

The Initiative and Referendum

As a corrective for the evils which had grown up in state legislatures there arose a demand for the introduction of a Swiss device known as the initiative and referendum.

The **initiative** permits anyone to draw up a proposed bill; and, on securing a certain number of signatures among the voters, to require the submission of the measure to the people at an election. If the bill thus initiated receives a sufficient majority, it becomes a law.

The **referendum** allows citizens who disapprove any act passed by the legislature to draw up a petition against it and thus bring the measure to the voters at the polls for approval or rejection.

These two practices constitute a form of **direct democracy**, rather than representative.

These devices were prescribed “to restore the government to the people.” The Populists favored them in their platform of 1896. Mr. Bryan, two years later, made them a part of his program, and in the same year South Dakota adopted them. In 1902 Oregon, after a strenuous campaign, added a direct legislation amendment to the state constitution.

Within ten years all the southwestern, mountain,

and Pacific states, except Texas and Wyoming, had followed this example. To the east of the Mississippi, however, direct legislation met a chilly reception. By 1920 only five states in this section had accepted it: Maine, Massachusetts, Ohio, Michigan, and Maryland, the last approving the referendum only.

The Recall Election

Executive officers and judges, as well as legislatures, had come in for their share of criticism, and it was proposed that they should likewise be subjected to a closer scrutiny by the public. For this purpose, there was advanced a scheme known as the **recall election**—which permitted a certain percentage of the voters to compel any office-holder, at any time during his or her term, to go before the people at a new election. This feature of direct democracy, tried out first in the city of Los Angeles, was extended to statewide uses in Oregon in 1908. It failed, however, to capture popular enthusiasm to the same degree as the initiative and referendum. At the end of ten years’ agitation, only ten states, mainly in the West, had adopted it for general purposes, and four of them did not apply it to the judges of the courts. Still it was extensively acclaimed in cities and incorporated into hundreds of municipal laws and charters.



Submitting petitions for the recall of Seattle, Washington mayor Hiram Gill in December 1910. Gill was removed by a recall election the following February, but voters returned him to the office in 1914. *McClure's* (October 1911)

As a general proposition, direct democracy in all its forms was bitterly opposed by men of a conservative cast of mind. It was denounced by Senator Henry Cabot Lodge as “nothing less than a complete revolution in the fabric of our government and in the fundamental principles upon which that government rests.” In his opinion, it promised to break down the representative principle and “undermine and overthrow the bulwarks of ordered liberty and individual freedom.”

President Taft shared Mr. Lodge’s views and spoke of direct government with scorn. “After we

have changed all the governmental machinery, so as to permit instantaneous expression of the people in constitutional amendments, in statutes, and in recall of public agents, what then?" he exclaimed, "Votes are not bread . . . referendums do not pay rent or furnish houses, recalls do not furnish clothes, initiatives do not supply employment or relieve inequalities of condition or of opportunity."

Commission Government For Cities

In the restless rooting out of evils, the management of cities early came under critical scrutiny. Many prescriptions were offered by doctors of the body politic. Chief among them was the idea of simplifying the city government so that the light of public scrutiny could shine through it. "Let us elect only a few men and make them clearly responsible for the city government!" was the new cry in municipal reform.

In result, many city councils were reduced in size. One of the two houses in legislative systems adopted by several cities, in imitation of the federal government, was abolished. In order that mayors could be held to account, some were given the power to appoint all the chief officials. This made the mayor, in certain cases, the only elective city official and gave the voters a "short ballot" containing only a few names—an idea which some proposed to apply also to the state government.

A further step in the concentration of authority was taken in Galveston, Texas, where the people, looking upon the ruin of their city wrought by the devastating storm of 1901 and confronted by the difficult problems of reconstruction, felt the need for a more businesslike management of city affairs and instituted a new form of local administration. They abolished the old scheme of mayor and council and vested all power in five **commissioners**, one of

whom, without any special **prerogatives**, was assigned to the office of "mayor president." In 1908, the commission form of government, as it was soon characterized, was adopted by Des Moines, Iowa. The attention of all municipal reformers was drawn to it, and it was hailed as the guarantee of a better day. By 1920, more than four hundred cities, including Memphis, Spokane, Birmingham, Newark, and Buffalo, had adopted it. Still the larger cities like New York and Chicago kept their boards of aldermen.

The City Manager Plan

A few years' experience with commission government revealed certain patent defects. The division of the work among five officers was frequently found to introduce dissension and irresponsibility. Commissioners were often lacking in the technical ability required to manage such difficult matters as fire and police protection, public health, public works, and public utilities.

Someone then proposed to carry over into city government an idea from the business world. In that sphere the stockholders of each corporation elect the directors, who in turn choose a business manager to conduct the affairs of the company. It was suggested that the city commissioners, instead of attempting to supervise the details of the city administration, should select a manager to do this.

The scheme of the **city manager** plan was put into effect in Sumter, South Carolina, in 1912. Like the commission plan, it became popular. Within eight years more than 150 towns and cities had adopted it. Among the larger municipalities were Dayton, Springfield (Ohio), Akron, Kalamazoo, and Phoenix. It anticipated the creation a new public service profession, that of city manager.

Lesson Two

History Overview and Assignments Measure of Economic Reform

"Undoubtedly the government can wisely do much more . . . to relieve the oppressed, to create greater equality of opportunity, to make reasonable terms for labor in employment, and to furnish vocational education. . . . There is a line beyond which the government cannot go with any good practical results in seeking to make men and society better."

– William Howard Taft



“Elisha Roosevelt sicketh the bears upon the bad boys of Wall Street.”
 Cartoon shows President Theodore Roosevelt standing on a hill in the background as two large bears labeled “Interstate Commerce Commission” and “Federal Courts” break up a crowd of Wall Street capitalists and stock market manipulators, causing them to scatter in all directions.
 The caption is based on 2 Kings 2:23-24.

Key People, Places, and Events

Elkins Act
 Hepburn Act

Vocabulary

extortion
 franchise
 workers’ compensation
 minimum wage
 mothers’ pension
 inheritance tax

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article: *Measure of Economic Reform*.
- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Complete your essay evaluating humanity’s need for laws, in light of its continual failure to live by the principles outlined in this unit’s Leading Ideas.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. From what famous document is the first subheading in today’s reading derived?
2. What major reforms were enacted during the period discussed in today’s article?
3. What was President Taft’s view regarding the role of government with respect to the betterment of citizens’ lives? What caution did he add?
4. Describe President Roosevelt’s argument for the inheritance tax.

Adapted for High School from the book:
History of the United States
 by Charles A. Beard and Mary R. Beard
Measures of Economic Reform

“To Promote the General Welfare”

The purification of the ballot, the restriction of the spoils system, and the enlargement of direct popular control over the organs of government were not the sole answers made by the reformers to the critics of American institutions. Nor were they the most important. In fact, they were regarded not as ends in themselves, but as means to serve a wider purpose. That purpose was the promotion of the “general welfare.”

The concrete objects covered by that broad term were many and varied; but they included the

prevention of **extortion** by railway and other corporations, the protection of public health, the extension of education, the improvement of living conditions in the cities, the elimination of undeserved poverty, the removal of gross inequalities in wealth, and more equality of opportunity.

All these things involved the use of the powers of government. Although a few clung to the ancient doctrine that the government should not interfere with private business at all, the American people at large rejected that theory as vigorously as they

rejected the opposite doctrine of an extreme socialism which exalts the state above the individual.

Leaders representing every shade of opinion proclaimed the government an instrument of common welfare to be used in the public interest. “We must abandon definitely,” said Roosevelt, “the *laissez-faire* theory of political economy and fearlessly champion a system of increased governmental control, paying no attention to the cries of worthy people who denounce this as socialistic.”

This view was shared by Mr. Taft, who observed: “Undoubtedly the government can wisely do much more . . . to relieve the oppressed, to create greater equality of opportunity, to make reasonable terms for labor in employment, and to furnish vocational education.” He was quick, though, to add his caution that “there is a line beyond which the government cannot go with any good practical results in seeking to make men and society better.”



A 1914 cartoon shows railroad companies asking the ICC (depicted as Uncle Sam) for permission to raise rates, while the ghost of a horrified William Henry Vanderbilt looks on.

Expansion of ICC Authority

The first attempts to use the government in a large way to control private enterprise in the public interest had been made by the northwestern states during the decade between 1870 and 1880, in response to charges advanced by the farmers, particularly those organized into granges, that the railways extorted the highest possible rates for freight and passengers, that favoritism was shown to

large shippers, and that fraudulent stocks and bonds were sold to the innocent public. It was claimed that railways were not like other enterprises, but were “quasi-public” concerns, like the roads and ferries, and thus subject to government control.

Accordingly, laws had been enacted bringing the railroads under state supervision. In some cases, the state legislature fixed the maximum rates to be charged by common carriers, and in other cases commissions were created with the power to establish the rates after an investigation.

This legislation was at first denounced in the East as nothing less than the “confiscation” of the railways in the interest of the farmers. Attempts to have the Supreme Court declare it unconstitutional were made without avail; still a principle was finally laid down to the effect that in fixing rates state legislatures and commissions must permit railway companies to earn a “fair” return on the capital invested.

Within a few years the granger spirit appeared in Congress. An investigation revealed a long list of abuses committed by the railways against shippers and travelers. The resulting Interstate Commerce Act of 1887, which created the Interstate Commerce Commission (ICC), forbade discriminations in rates, and prohibited other objectionable practices on the part of railways.

Unfortunately, this measure was loosely enforced, and the abuses against which it was directed continued almost unabated. A demand for stricter control grew louder and louder. Congress was forced to heed and expand ICC authority. In 1903 it passed the **Elkins Act**, forbidding railways to charge rates other than those published, and laid penalties upon the officers and agents of companies who granted secret favors to shippers, and upon shippers who accepted them. Three years later a still more drastic step was taken by the passage of the **Hepburn Act**. The Interstate Commerce Commission was authorized, upon complaint of a party aggrieved and after a public hearing, to determine whether just and reasonable rates had been charged by the companies. In effect, the right to fix freight and passenger rates was taken out of the hands of the owners of the railways engaged in interstate commerce and vested in the hands of the Interstate Commerce Commission. Thus, private property to the value of \$20,000,000,000 or more was declared to be a matter of public concern and subject to government regulation in the common interest.

Municipal Utilities

Similar problems arose in connection with the street railways, electric light plants, and other utilities in the great cities. In the beginning the right to construct such undertakings was freely, and often corruptly, granted to private companies by city councils. Distressing abuses arose in connection with such practices. Many grants or franchises were made perpetual, or perhaps for a term of 999 years. The rates charged and services rendered were left largely to the will of the companies holding the franchises. Mergers or unions of companies were common, and the public was deluged with stocks and bonds of doubtful value; bankruptcies were frequent. The connection between the utility companies and the politicians was, to say the least, not always in the public interest.

American ingenuity was quick to devise methods for eliminating such evils. Three lines of progress were laid out by the reformers. One group proposed that such utilities should be subject to municipal or state regulation, that the formation of utility companies should be under public control, and that the issue of stocks and bonds must be approved by public authority. State and municipal commissions were created to exercise this great power over “quasi-public corporations.” Wisconsin, by laws enacted in 1907, put all heat, light, water works, telephone, and street railway companies under the supervision of a single commission. Other states rapidly followed this example. By 1920 the principle of public control over municipal utilities was accepted in nearly every section of the Union.

A second line of reform appeared in the “model franchise” for utility corporations. An illustration of this was afforded by the Chicago street railway settlement of 1906. The total capital of the company was fixed at a definite sum, its earnings were agreed upon, and the city was given the right to buy and operate the system if it desired to do so. In many states, about the same time, it was provided that no **franchises** to utility companies could run more than twenty-five years.

A third group of reformers were satisfied with nothing short of municipal ownership. They proposed to drive private companies entirely out of the field and vest the ownership and management of municipal plants in the city itself. This idea was extensively applied to electric light and water works plants, but to street railways in only a few cities, including San Francisco and Seattle. In New York,

the subways are owned by the city but leased for operation.

Tenement House Control

Among the other pressing problems of the cities was the overcrowding in houses unfit for habitation. An inquiry in New York City made under the authority of the state in 1902 revealed poverty, misery, slums, dirt, and disease almost beyond imagination.

The immediate answer was the enactment of a **tenement** house law prescribing in great detail the size of the rooms, the air space, the light, and the sanitary arrangement for all new buildings. An immense improvement followed, and the idea was quickly taken up in other states having large industrial centers. In 1920 New York made a further alteration to the legal rights of landlords by assuring to the public “reasonable rents” for flats and apartments.



Tenements at Park Avenue and 107th Street, New York City (c.1898–1910)

Tenements

The term “tenement” originally referred to residences occupied by tenants, who pay “rent” to reside in the dwellings. During the rapid urbanization of the Industrial Revolution, the word came to be associated with multiple-dwelling apartment buildings marked by poverty and poor sanitation. Overcrowding led some tenements to become “slums,” or densely populated urban residential areas consisting of poorly constructed or deteriorated buildings.

Workers’ Compensation

No small part of the poverty in cities was due to injury of wage-earners while at their trade. Every year the number of men and women killed or

wounded in industry mounted higher. Under the old law, the workman or his family had to bear the loss unless the employer was found guilty of some extraordinary negligence. Even in that case an expensive lawsuit was usually necessary to recover damages. In short, although employers insured their buildings and machinery against necessary risks from fire and storm, they allowed their employees to assume the heavy losses due to accidents. The injustice of this, though apparent enough now, was once not generally recognized. It was said to be unfair to make the employer pay for injuries for which he was not personally responsible, but the argument was overborne.

About 1910 there set in a decided movement in the direction of lifting the burden of accidents from the unfortunate victims.

In the first place, **workers' compensation** laws were enacted requiring employers to pay damages in certain amounts according to the nature of the case, no matter how the accident occurred, as long as the injured person was not guilty of willful negligence. By 1914 more than one-half the states had such laws.

In the second place, schemes of industrial insurance were developed in the form of automatic grants made by state commissions to persons injured in industries, the funds to be provided by the employers or the state or by both. By 1917 thirty-six states had legislation of this type.

Minimum Wages and Mothers' Pensions

Another source of poverty, especially among women and children, was the low wages paid for their labor. Report after report showed this. In 1912 Massachusetts took a significant step in the direction of declaring the **minimum wages** which might be paid to women and children.

Oregon, the following year, created a commission with power to prescribe minimum wages in certain industries, based on the cost of living, and to enforce the rates fixed. Within a short time one-third of the states had legislation of this character, but it wasn't until 1938 that a federal minimum wage law was enacted.

To cut away some of the evils of poverty and enable widows to keep their homes intact and bring up their children, a device known as **mothers' pensions** became popular during the second decade of the twentieth century. At the opening of 1913 two states, Colorado and Illinois, had laws authorizing the payment from public funds of definite sums to

widows with children. Within four years, thirty-five states had similar legislation.



The General Federation of Women's Clubs, which advocated for mothers' pensions

Inheritance Tax

As a part of the campaign waged against poverty by reformers there came a demand for heavy taxes upon great fortunes, particularly taxes upon inheritances or estates passing to heirs on the death of the owners. A graduated estate tax had been enacted in 1898 as part of a tax package to provide funding for the Spanish American War but had been repealed in 1902.

Roosevelt was an ardent champion of **inheritance tax** and dwelt upon it at length in his message to Congress in 1907. "Such a tax," he said, "would help to preserve a measurable equality of opportunity for the people of the generations growing to manhood . . . Our aim is to recognize what Lincoln pointed out: the fact that there are some respects in which men are obviously not equal; but also, to insist that there should be equality of self-respect and of mutual respect, an equality of rights before the law, and at least an approximate equality in the conditions under which each man obtains the chance to show the stuff that is in him when compared with his fellows."

The spirit of the new century was, therefore, one of reform, not of revolution. It called for no evolutionary or utopian experiments, but for the steady and progressive enactment of measures aimed at abuses and designed to accomplish tangible results in the name of public welfare.

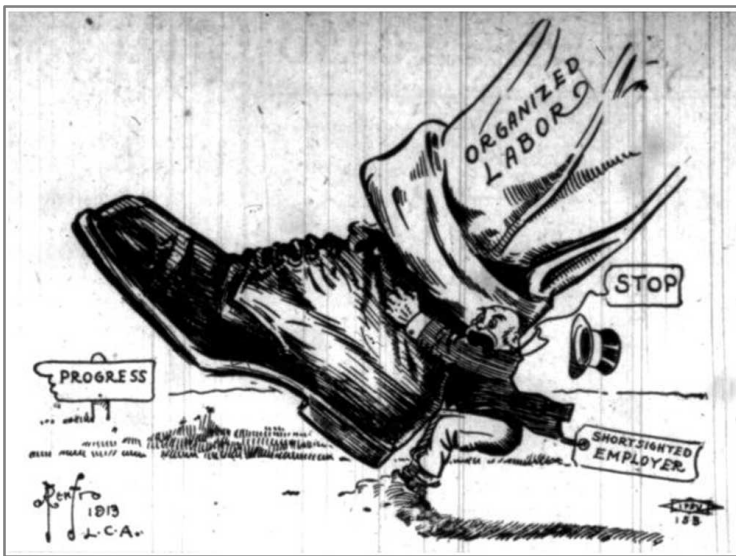
The Artios Home Companion Series

Unit 12: Industrial Democracy

Teacher Overview

“In the early days of the development of industry, the employer and capital investor were frequently one. Daily contact was had between him and his employees, who were his friends and neighbors . . . Because of the proportions which modern industry has attained, employers and employees are too often strangers to each other . . . Personal relations can be revived only through adequate representation of the employees. Representation is a principle which is fundamentally just and vital to the successful conduct of industry . . . It is not consistent for us as Americans to demand democracy in government and practice autocracy in industry . . . With the developments what they are in industry today, there is sure to come a progressive evolution from aristocratic single control, whether by capital, labor, or the state, to democratic, cooperative control by all three.”

– John D. Rockefeller, Jr.



Political cartoon showing organized labor marching towards progress, while a shortsighted employer tries to stop labor.
Seattle Union Record, November 1, 1913

Suggested Assignments

In this unit, students will:

- Complete two lessons in which they will learn about the **spirit of industrial reform in America** and the **rise and expansion of organized labor**, journaling and answering discussion questions as they read.
- Complete biography notebook pages on **John D. Rockefeller, Sr.** and his son **John D. Rockefeller, Jr.**
- Define vocabulary words.
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

God honors integrity and despises corruption.

A good name is to be chosen rather than great riches, and favor is better than silver or gold. The rich and the poor meet together; the Lord is the Maker of them all. The prudent sees danger and hides himself, but the simple go on and suffer for it. The reward for humility and fear of the Lord is riches and honor and life. Thorns and snares are in the way of the crooked; whoever guards his soul will keep far from them.

– Proverbs 22:1-5

God wants us to be unselfish.

Do nothing from selfish ambition or conceit, but in humility count others more significant than yourselves. Let each of you look not only to his own interests, but also to the interests of others.

– Philippians 2:3-4

Scripture teaches that workers should be appropriately paid.

For Scripture says, “You shall not muzzle an ox when it treads out the grain,” and “The laborer deserves his wages.”

– 1 Timothy 5:18

Lesson One

History Overview and Assignments Reform of Labor Relations in America

“Between 1830 and 1860, several aggressive steps were taken in the American labor movement. For one thing, the number of local unions increased by leaps and bounds in all the industrial towns. For another, there was established in every large manufacturing city a central labor body composed of delegates from the unions of the separate trades.”

– from the adapted article below



Agitated workers face the factory owner in *The Strike*, painted by Robert Koehler in 1886

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article: *The Spirit of Reform in America*.
- Complete biography notebook pages on **John D. Rockefeller, Sr.** and his son, **John D. Rockefeller, Jr.**
- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Be sure to visit your ArtiosHCS curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

John D. Rockefeller, Jr.
American Federation of Labor
National Labor Union
Knights of Labor

Vocabulary

strike
ineffectual
company union

Discussion Questions

1. What were the striking features of the new economic age?
2. Give Mr. Rockefeller’s view of industrial democracy.
3. Outline the efforts made by employers to establish better relations with their employees.
4. Trace the rise and growth of the American Federation of Labor.
5. How far back in America’s history does the labor movement extend?
6. Compare the purposes and results of the National Labor Union and the Knights of Labor.
7. State the chief policies of the American Federation of Labor.

Adapted for High School from the book:
History of the United States
by Charles A. Beard and Mary R. Beard
The Spirit of Reform in America

INDUSTRIAL DEMOCRACY

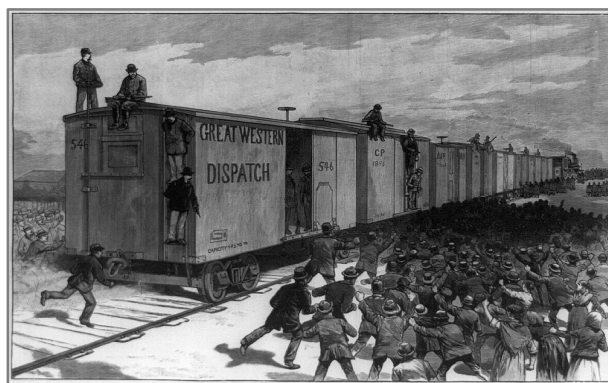
A New Economic Era

The spirit of criticism, and the measures of reform designed to meet it which characterized the opening years of the twentieth century, were merely the signs of a new age. The US had definitely passed into industrialism. The number of city dwellers employed for wages contrasted with the farmers working on their own land was steadily mounting. The free land, once the refuge of restless working men of the East and the immigrants from Europe, was a thing of the past. As President Roosevelt later said in speaking of the great coal **strike**, “A few generations ago, the American workman could have saved money, gone west, and taken up a homestead. Now the free lands were gone. In earlier days, a man who began with a pick and shovel might come to own a mine. That outlet was now closed as regards the immense majority . . . The majority of men who earned wages in the coal industry, if they wished to progress at all, were compelled to progress not by ceasing to be wage-earners but by improving the conditions under which all the wage-earners of the country lived and worked.”

The disappearance of the free land, President Roosevelt went on to say, also produced “a crass inequality in the bargaining relation of the employer and the individual employee standing alone. The great coal-mining and coal-carrying companies which employed their tens of thousands could easily dispense with the services of any particular miner. The miner, on the other hand, however expert, could not dispense with the companies. He needed a job; his wife and children would starve if he did not get one . . . Individually the miners were **ineffectual** when they sought to enter a wage contract with the great companies; they could make fair terms only by uniting into trade unions to bargain collectively.” It was of this state of affairs that President William Howard Taft spoke when he favored the modification of the common law “so as to put employees of little power and means on a level with their employers in adjusting and agreeing upon their mutual obligations.”

John D. Rockefeller, Jr. (son of John D. Rockefeller), on the side of the great captains of

industry, recognized the same facts. He said: “In the early days of the development of industry, the employer and capital investor were frequently one. Daily contact was had between him and his employees, who were his friends and neighbors. . . . Because of the proportions which modern industry has attained, employers and employees are too often strangers to each other. . . . Personal relations can be revived only through adequate representation of the employees. Representation is a principle which is fundamentally just and vital to the successful conduct of industry. . . . It is not consistent for us as Americans to demand democracy in government and practice autocracy in industry. . . . With the developments what they are in industry today, there is sure to come a progressive evolution from aristocratic single control, whether by capital, labor, or the state, to democratic, cooperative control by all three.”



The Great Southwest Railroad Strike of 1886 was a trade union strike involving more than 200,000 workers.

COOPERATION BETWEEN EMPLOYERS AND EMPLOYEES

Company Unions

The changed economic life described by the three eminent men quoted above was acknowledged by several great companies and business concerns. All over the country, decided efforts were made to bridge the gulf which industry and the corporation had created. Among the devices adopted was that of the **company union**. In one of the western lumber mills, for example, all the employees were invited to join a company organization; they held monthly meetings to discuss matters of common concern;

they elected a “shop committee” to confer with the representatives of the company; and periodically the agents of the employers attended the conferences of the men to talk over matters of mutual interest.

The function of the shop committee was to consider wages, hours, safety rules, sanitation, recreation, and other problems. Whenever any employee had a grievance, he took it up with the foreman and, if it was not settled to his satisfaction, he brought it before the shop committee. If the members of the shop committee decided in favor of the man with a grievance, they attempted to settle the matter with the company’s agents. All these things failing, the dispute was transferred to a grand meeting of all the employees with the employers’ representatives, in common council. A deadlock, if it ensued from such a conference, was broken by calling in impartial arbitrators selected by both sides from among citizens outside the mill.

Thus the employees were given a voice in all decisions affecting their work and welfare; rights and grievances were treated as matters of mutual interest rather than individual concern. Representatives of trade unions from outside, however, were rigidly excluded from all negotiations between employers and the employees.

Profit Sharing

Another proposal for drawing capital and labor together was to supplement the wage system by other ties. Sometimes lump sums were paid to employees who remained in a company’s service for a definite period of years. Some were given a certain percentage of the annual profits. In other instances, employees were allowed to buy stock on easy terms and thus become part owners in the concern. This last plan was carried so far by a large soap manufacturing company that the employees, besides becoming stockholders, secured the right to elect representatives to serve on the board of directors who managed the entire business.

So extensive had profit-sharing become by 1914 that the President deemed it worthy of a special study. Though opposed by regular trade unions, it was undoubtedly growing in popularity.

Labor Managers

Another effort of employers to meet the problems of the new era appeared in the appointment of specialists known as employment managers, whose task it was to study the relations existing between employers and workers and

discover practical methods for dealing with each grievance as it arose. By 1918, hundreds of big companies had recognized this modern “profession,” and universities were giving courses of instruction on the subject to young men and women.

In that year, a national conference of employment managers was held in Rochester, New York. The discussion revealed a wide range of duties assigned to managers, including questions concerning wages, hours, sanitation, rest rooms, recreational facilities, and considerations of every kind designed to make the conditions in mills and factories safer and more humane. Thus it was evident that hundreds of employers had abandoned the old idea that they were dealing merely with individual employees and that their obligations ended with the payment of any wages they saw fit to fix. In short, they were seeking to develop a spirit of cooperation to take the place of competition and enmity; and to increase the production and quality of commodities by promoting the efficiency and happiness of the producers.



American Federation of Labor union label (c.1900)

THE RISE AND GROWTH OF ORGANIZED LABOR

The American Federation of Labor

Meanwhile a powerful association of workers representing all the leading trades and crafts, organized into unions of their own, had been built up outside the control of employers. This was the **American Federation of Labor**, a nationwide union of unions, founded in 1886 on the basis of beginnings made five years before. At the time of its establishment it had approximately 150,000 members. Its growth up to the end of the century was slow, for the total enrollment in 1900 was only 300,000. At that point, the increase became marked. The membership reached 1,650,000 in 1904 and more than 3,000,000 in 1919.

Counted in the ranks of organized labor were several strong unions, friendly to the Federation, though not affiliated with it. Such, for example, were the Railway Brotherhoods with more than half a million members. By the opening of 1920, the total strength of organized labor was put at about four million members, meaning, if we include their families, that nearly one-fifth of the people of the United States were in some definite way dependent upon the operations of trade unions.

Historical Background

The American Federation of Labor was the culmination of a long and significant history. Before the end of the eighteenth century, the skilled workmen—printers, shoemakers, tailors, and carpenters—had, as we have seen, formed local unions in the large cities. Between 1830 and 1860, several aggressive steps were taken in the American labor movement. For one thing, the number of local unions increased by leaps and bounds in all the industrial towns. For another, there was established in every large manufacturing city a central labor body composed of delegates from the unions of the separate trades. In the local union the printers or the cordwainers (shoemakers), for example, considered only their special trade problems. In the central labor union, printers, cordwainers, iron molders, and other craftsmen considered common problems and learned to cooperate with one another in enforcing the demands of each craft.

A third step was the federation of the unions of the same craftsmen in different cities. The printers of New York, Philadelphia, Boston, and other towns, for instance, drew together and formed a national trade union of printers built upon the local unions of that craft. By the eve of the Civil War there were four or five powerful national unions of this character. The expansion of the railway made travel and correspondence easier and national conventions possible even for workmen of small means. About 1834 an attempt was made to federate the unions of all the different crafts into a national organization; but the effort was premature.

The National Labor Union

The plan which failed in 1834 was tried again in the 1860s. During the Civil War, industries and railways had flourished as never before; prices had risen rapidly; the demand for labor had increased; wages had mounted slowly, but steadily. Hundreds

of new local unions had been founded, and eight or ten national trade unions had sprung into being. The time was ripe, it seemed, for a national consolidation of all labor's forces; and in 1866, the year after the surrender of General Lee at Appomattox, the **National Labor Union** was formed at Baltimore under the leadership of an experienced organizer, W.H. Sylvis of the iron molders. The purpose of the National Labor Union was not merely to meet labor's standard demands concerning hours, wages, and conditions of work or to maintain the gains already won. It leaned toward political action and radical opinions. Above all, it sought to eliminate the conflict between capital and labor by making workers the owners of shops through the formation of cooperative industries. For six years the National Labor Union continued to hold conferences and carry on its propaganda; but most of the cooperative enterprises failed, political dissensions arose, and by 1872 the experiment had come to an end.

The Knights of Labor

While the National Labor Union was experimenting, there grew up in the industrial world a more radical organization known as the Noble Order of the **Knights of Labor**. It was founded in Philadelphia in 1869, first as a secret society with rituals, signs, and passwords; "so that no spy of the boss can find his way into the lodge room to betray his fellows," as the Knights put it. In form the new organization was simple. It sought to bring all laborers, skilled and unskilled, men and women, white and non-white, into a mighty body of local and national unions without distinction of trade or craft. By 1885, ten years after the national organization was established, it boasted a membership of over 700,000. The Knights of Labor advocated public ownership of the railways and other utilities, as well as the formation of cooperative societies to own and manage stores and factories.

As the Knights were radical in spirit and their strikes numerous, prolonged, and often accompanied by violence, the organization alarmed employers and the general public, raising up against itself a vigorous opposition. Weaknesses within, as well as foes from without, started the Knights on the path to dissolution. They waged more strikes than they could carry on successfully; their cooperative experiments failed as those of other labor groups before them had failed; and the rank and file could not be kept in line. The majority of the members

wanted immediate gains in wages or the reduction of hours; when their hopes were not realized they drifted away from the order.

The troubles were increased by the appearance of the American Federation of Labor, a still mightier organization composed mainly of skilled workers who held strategic positions in industry. When the Knights failed to secure the effective support of the Federation in their efforts to organize the unskilled, the employers closed in upon them; then the Knights declined rapidly in power. By 1890 they were a negligible factor, and in a short time they passed into the limbo of dead experiments.

The Policies of the American Federation of Labor

Unlike the Knights of Labor, the American Federation of Labor sought, first of all, to be very practical in its objects and methods. It focused strictly on the business of organizing unions for the purpose of increasing wages, shortening hours, and improving working conditions for its members. It did not try to include everybody in one big union but brought together the employees of each particular craft whose interests were clearly the same. To prepare for strikes and periods of unemployment, it raised large funds by imposing heavy dues and created a benefit system to hold workers loyally to the union. In order to permit action on a national

scale, it gave the superior officers extensive powers over local unions.

While declaring that employers and employees had much in common, the Federation strongly opposed individual company unions. Employers, it argued, were affiliated with the National Manufacturers' Association or with similar employers' organizations; every important industry was now national in scope; and wages and hours, in view of competition with other shops, could not be determined in a single factory, no matter how amicable the relations between the company and its workers in that particular plant. For these reasons, the Federation declared company unions and local shop committees inherently weak; it insisted that hours, wages, and other labor standards should be fixed by general trade agreements applicable to all the plants of a given industry, even if subject to local modifications.

At the same time, the Federation, far from deliberately antagonizing employers, sought to enlist their cooperation and support. It affiliated with the National Civic Federation, an association of businessmen, financiers, and professional men, founded in 1900 to promote friendly relations in the industrial world. In brief, the American Federation of Labor accepted the modern industrial system and, by organization within it, endeavored to secure certain definite terms and conditions for trade unionists.

Lesson Two

History Overview and Assignments The Wider Relations of Organized Labor

"The 'trade unionism pure and simple' espoused by the American Federation of Labor seemed to involve at first glance nothing but businesslike negotiations with employers. In practice it did not work out that way."

– from the adapted article below



Seal of the Industrial Workers of the World



Socialist Labor Party of America



Seal of the Socialist Party

Reading and Assignments

- Review the discussion questions and vocabulary, then read the article: *The Wider Relations of Organized Labor*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Vocabulary

espouse	repudiate	illiterate	anarchists
socialism	injunction	sojourn	asylum
communism	writ	subsistence	assimilate
vitality	compulsory	aliens	auspice

Key People, Places, and Events

Socialist Labor Party	Marxian socialist	Industrial Workers of the World
Karl Marx	Socialist Party	Bolshevism
Nathaniel Hawthorne	Eugene V. Debs	Chinese Exclusion Act
Horace Greeley	Samuel Gompers	Immigration Act of 1917
Wendell Phillips		

Discussion Questions

1. Outline the rise of the socialist movement in the US.
2. List some reasons why communistic enterprises usually fail.
3. Explain the injunction process.
4. Why are labor and immigration closely related?
5. Outline the history of restrictions on immigration in the US.
6. What problems arise in connection with the assimilation of the foreigner to American life?

Adapted for High School from the book:

History of the United States

by Charles A. Beard and Mary R. Beard

The Wider Relations of Organized Labor

The Socialists

The “trade unionism pure and simple” **espoused** by the American Federation of Labor seemed to involve at first glance nothing but businesslike negotiations with employers. In practice it did not work out that way. The Federation was only six years old when a new organization, appealing directly for the labor vote—namely, the **Socialist Labor Party**—nominated a candidate for president, launched into a national campaign, and called upon trade unionists to desert the older parties and enter its fold.

The socialistic idea, introduced into national politics in 1892, had been long in germination.

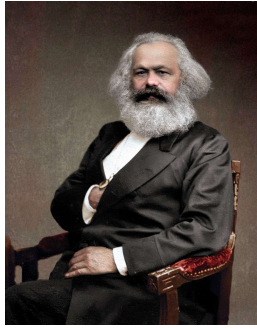
Socialism and Communism

The definition of **socialism**, according to the Oxford English dictionary, is: “a political and

economic theory of social organization which advocates that the means of production, distribution, and exchange should be owned or regulated by the community as a whole.” In practice, socialism is a system of social organization in which a society’s major industries are controlled by the democratically elected government rather than by individuals.

Communism is defined by Oxford as “a political theory derived from **Karl Marx**, advocating class war and leading to a society in which all property is publicly owned, and each person works and is paid according to their abilities and needs.”

Under socialism, individuals can own property. Under communism, private property does not exist. A strong centralized government controls production and provides citizens with their basic needs.



Karl Marx. Photo by John Jabez Edwin Mayall, colored by Olga Shirnina

Before the Civil War, a number of reformers, including writer **Nathaniel Hawthorne**, newsman **Horace Greeley**, and abolitionist lawyer **Wendell Phillips**, deeply moved by the poverty of the great industrial cities, had earnestly sought relief in the establishment of cooperative or **communistic** colonies. They believed that people should go into the country, secure land and tools, own them in common so that no one could profit from exclusive ownership, and produce by common labor the food and clothing necessary for their support. For a time this movement attracted wide interest, but it had little **vitality**. Nearly all the colonies failed. Selfishness and indolence usually disrupted the best of them.



New Harmony, a utopian attempt; depicted as proposed by Robert Owen. Drawn and engraved by F. Bate

In the course of time this “utopian” idea was abandoned, and another set of socialist doctrines, claiming to be more “scientific,” appeared instead. The new school of socialists, adopting the principles of German writer and agitator Karl Marx, appealed directly to working men. It urged them to unite against the capitalists, to gain possession of the machinery of government, and to introduce collective or public ownership of railways, land, mines, mills, and other means of production. The **Marxian socialists**, therefore, became political. They sought to organize labor and win elections. Like

the other parties they put forward candidates and platforms. The Socialist Labor Party in 1892, for example, declared in favor of government ownership of utilities, free schoolbooks, women’s suffrage, heavy income taxes, and the referendum. The **Socialist Party**, founded in 1900, with **Eugene V. Debs**, the leader of the Pullman strike, as its candidate, called for public ownership of all trusts, monopolies, mines, railways, and the chief means of production.

In the course of time the vote of the latter organization rose to considerable proportions, reaching almost a million in 1912. It declined four years later and then rose in 1920 to about the same figure.

In their appeal for votes, the socialists of every type turned first to labor. At the annual conventions of the American Federation of Labor they entreated the delegates to endorse socialism. The president of the Federation, **Samuel Gompers**, on each occasion took the floor against them. He **repudiated** socialism and the socialists, on both theoretical and practical grounds. He opposed too much public ownership, declaring that the government was as likely as any private employer to oppress labor. The approval of socialism, he maintained, would split the Federation on the rock of politics, weaken it in its fight for higher wages and shorter hours, and prejudice the public against it. At every turn he was able to vanquish the socialists in the Federation, although he could not prevent it from endorsing public ownership of the railways at the convention of 1920.



Samuel Gompers and other labor leaders

The Extreme Radicals

Some of the socialists, defeated in their efforts to capture organized labor and seeing that the gains in elections were very meager, broke away from both trade unionism and politics.

One faction, the **Industrial Workers of the World**, founded in 1905, declared themselves opposed to all capitalists, the wage system, and craft unions. They asserted that “the working class and the employing class have nothing in common,” and that trade unions only pitted one set of workers against another set. They repudiated all government ownership and the government itself, boldly proclaiming their intention to unite all employees into one big union and seize the railways, mines, and mills of the country.

This doctrine, so revolutionary in tone, called down upon the extremists the condemnation of the American Federation of Labor as well as of the general public. At its convention in 1919, the Federation announced its “firm adherence to American ideals.”

The Federation and Political Issues

The hostility of the Federation to the socialists did not mean, however, that it was indifferent to political issues or political parties. On the contrary, from time to time, at its annual conventions, it endorsed political and social reforms, such as the initiative, referendum, and recall, the abolition of child labor, the exclusion of Asian labor, old-age pensions, and government ownership. Moreover, it adopted the policy of “rewarding friends and punishing enemies” by advising members to vote for or against candidates according to their stand on the demands of organized labor.

This policy was pursued with special zeal in connection with disputes over the use of **injunctions** in labor controversies. *An injunction is a bill or writ issued by a judge ordering some person or corporation to do or to refrain from doing something.* For example, a judge may order a trade union to refrain from interfering with non-union men or to continue at work handling goods made by non-union labor; and may fine or imprison those who disobey the injunction, the penalty being inflicted for “contempt of court.” This ancient legal device came into prominence in connection with nationwide railway strikes in 1877. It was applied with increasing frequency after its effective use against Eugene V. Debs in the Pullman strike of 1894.

Aroused by the extensive use of the writ, organized labor demanded that the power of judges to issue injunctions in labor disputes be limited by law. Representatives of the unions sought support from the Democrats and the Republicans; they

received from the former very specific and cordial endorsement.



Pullman strikers outside Arcade Building in Pullman, Chicago. The Illinois National Guard can be seen guarding the building during the Pullman Railroad Strike in 1894.

In 1896 the Democratic platform denounced “government by injunction as a new and highly dangerous form of oppression.” Mr. Gompers, while refusing to commit the Federation to Democratic politics, privately supported Mr. Bryan. In 1908, he came out openly and boasted that eighty percent of the votes of the Federation had been cast for the Democratic candidate. Again in 1912 the same policy was pursued. The reward was the enactment in 1914 of a federal law exempting trade unions from prosecution as combinations in restraint of trade, limiting the use of the injunction in labor disputes, and prescribing trial by jury in cases of contempt of court.

This measure was hailed by Mr. Gompers as the “Magna Carta of Labor” and a vindication of his policy. As a matter of fact, however, it did not prevent the continued use of injunctions against trade unions. Nevertheless Mr. Gompers was unshaken in his conviction that organized labor should not attempt to form an independent political party or endorse socialist or other radical economic theories.

Organized Labor and the Public

Besides its relations to employers, radicals within its own ranks, and political questions, the Federation had to face responsibilities to the general public. With the passing of time these became heavy and grave. While industries were small and conflicts were local in character, a strike seldom affected anybody but the employer and the employees immediately involved in it. When, however, industries and trade unions became organized on a national scale and a strike could paralyze a basic

enterprise like coal mining or railways, the vital interests of all citizens were put in jeopardy. Moreover, as increases in wages and reductions in hours often added directly to the cost of living, the action of the unions affected the well-being of all—the food, clothing, and shelter of the whole people.

For the purpose of meeting the issue raised by this state of affairs, it was suggested that employers and employees should lay their disputes before commissions of arbitration for decision and settlement. President Cleveland, in a message of April 2, 1886, had proposed such a method for disposing of industrial controversies, and two years later Congress enacted a voluntary arbitration law applicable to the railways. The principle was extended in 1898 and again in 1913, and under the authority of the federal government many contentions in the railway world have been settled by arbitration.

The success of such legislation induced some students of industrial questions to urge that unions and employers be compelled to submit all disputes to official tribunals of arbitration. Kansas actually passed such a law in 1920. Congress in the same year created a federal board of nine members to which all railway controversies not settled by negotiation must be submitted. Strikes, however, were not absolutely forbidden. Generally speaking, both employers and employees opposed **compulsory** adjustments without offering any substitute in case voluntary arbitration should not be accepted by both parties to a dispute.

IMMIGRATION AND AMERICANIZATION

The Problems of Immigration

From its very inception, the American Federation of Labor, like the Knights of Labor before it, was confronted by numerous questions raised by the ever swelling tide of immigrants coming to American shores. In its effort to make each trade union all-inclusive, it had to wrestle with a score or more languages. When it succeeded in thoroughly organizing a craft, it often found its purposes defeated by an influx of foreigners ready to work for lower wages and thus undermine the foundations of the union.

At the same time, persons outside the labor movement became apprehensive as they contemplated the undoubted evil, as well as the good, that seemed to be associated with the “foreign

invasion.” They saw whole sections of great cities occupied by people speaking foreign tongues, reading only foreign newspapers, and looking to the Old World alone for their ideas and their customs. They witnessed an expanding army of totally **illiterate** people, men and women who could read and write no language at all; while among those immigrants who could read, few knew anything of American history, traditions, and ideals.



Immigrants arriving at Ellis Island (1902)

Official reports revealed that over twenty percent of the men of the draft army during World War I could not read a newspaper or write a letter home. Perhaps most alarming of all was the discovery that thousands of immigrants were in the United States only on a temporary **sojourn**, solely to make money and return home with their savings. These men, willing to work for low wages and reside in places unfit for human habitation, had no stake in the country and did not care what became of it.

The Restriction of Immigration

In all this there was, strictly speaking, no cause for surprise. Since the foundation of the American republic the policy of the government had been to encourage the coming of the foreigner. For nearly one hundred years no restraining act was passed by Congress, while two important laws positively encouraged it: namely, the Homestead Act of 1862 and the contract labor law of 1864. Not until American working men came into open collision with cheap Chinese labor on the Pacific Coast did the federal government spread the first measure of limitation on the statute books. After the discovery of gold, and particularly after the opening of the railway construction era, a horde of laborers from China descended upon California. Accustomed to starvation wages and indifferent to the conditions of living, they threatened to cut the American standard to the point of **subsistence**.

By 1876 the protest of American labor was loud and long, and both the Republicans and the Democrats gave heed to it. In 1882 Congress passed the **Chinese Exclusion Act** prohibiting the admission of Chinese laborers to the United States for a term of ten years—later extended by legislation. In a little while the demand arose for the exclusion of the Japanese as well. In this case no exclusion law was passed, but an understanding was reached by which Japan agreed not to issue passports to her laborers authorizing them to come to the United States. By act of Congress in 1907 the President was empowered to exclude any laborers who, having passports to Canada, Hawaii, or Mexico, attempted to enter the continental US.

These laws and agreements, however, did not remove all grounds for agitation on the subject. They were difficult to enforce, and it was claimed by residents of the West Coast that in spite of federal authority Oriental laborers were finding their way into American ports. Moreover, several western states, anxious to preserve the soil for American ownership, enacted laws making it impossible for Chinese and Japanese people to buy land outright; and in other ways they discriminated against Asians.

Such proceedings placed the federal government in an embarrassing position. By treaty it had guaranteed specific rights to Japanese citizens in the United States, and the government at Tokyo contended that the state laws just cited violated the terms of the international agreement. The western states were fixed in their determination to control Asian residents; Japan was equally persistent in asking that no badge of inferiority be attached to her citizens. Subjected to pressure on both sides, the federal government sought a way out of the deadlock.

Having embarked upon the policy of restriction in 1882, Congress readily extended it. In that same year it barred entry to paupers, criminals, convicts, and the insane. Three years later, mainly owing to the pressure of the Knights of Labor, it forbade any person, company, or association to import **aliens** under contract. By an act of 1887, the contract labor restriction was made even more severe. In 1903, **anarchists** were excluded, and the Bureau of Immigration was transferred from the Treasury Department to the Department of Commerce and Labor, in order to provide for a more rigid execution of the law.

In 1907 the classes of persons denied admission were widened to embrace those suffering from physical and mental defects and otherwise deemed

unfit for effective citizenship. When the Department of Labor was established in 1913, the enforcement of the law was placed in the hands of a former leader in the American Federation of Labor.

The Literacy Test

Still the advocates of restriction were not satisfied. Still organized labor protested and demanded more protection against the competition of immigrants. After a thirty-year battle, the **Immigration Act of 1917** was passed, excluding, among others deemed undesirable, “all aliens over sixteen years of age, physically capable of reading, who cannot read the English language or some other language or dialect, including Hebrew or Yiddish.” Even President Wilson could not block it, for a two-thirds vote to overcome his veto was mustered in Congress.

This act, while it served to exclude illiterates, made no drastic cut in the volume of immigration. Indeed a material reduction was resolutely opposed in many quarters. People of certain nationalities already in the United States objected to every barrier that shut out their own kinsmen. Some Americans of the old stock still held to the idea that the United States should continue to be an **asylum** for “the oppressed of the earth.” Many employers looked upon an increased labor supply as the means of escaping what they called “the domination of trade unions.” “In the babel of countless voices, the discussion of these vital matters went on in town and country.

Americanization

Intimately connected with the subject of immigration was a call for the “Americanization” of the alien already within America’s gates. The revelation of the illiteracy in the army raised the cry, and the demand was intensified when it was found that many of the leaders among the extreme radicals were foreign in birth and citizenship. Innumerable programs for **assimilating** the alien to American life were drawn up, and in 1919 a national conference on the subject was held in Washington under the **auspices** of the Department of the Interior. All were agreed that the foreigner should be taught to speak and write the language and understand the government of their new country. Congress was urged to lend aid in this vast undertaking. America, as ex-President Roosevelt had said, was to find out “whether it was a nation or a boarding-house.”

The Artios Home Companion Series Unit 13: Wilson and the Start of World War I

Teacher Overview

WHILE THE US WAS battling national issues and conflicts during the early part of the twentieth century, trouble was brewing in Europe. After the assassination of the Archduke of Austria-Hungary, one by one European nations and finally the US were forced to become involved in a war in order to stop another nation's aggression.



Woodrow Wilson, official presidential portrait, by Frank Graham Cootes (1913)

Suggested Assignments

In this unit, students will:

- Complete four lessons in which they will learn about **President Wilson** and the **outbreak of World War I**, journaling and answering discussion questions as they read.
- Complete a biography notebook page on **Woodrow Wilson**.
- Define vocabulary words.
- Make an alphanumeric outline, using the method described on website found on their **ArtiosHCS** curriculum website
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

Evil desires stir up conflict.

What causes quarrels and what causes fights among you? Is it not this, that your passions are at war within you?

– James 4:1

Seek, whenever possible, to live in peace.

If possible, so far as it depends on you, live peaceably with all.

– Romans 12:18

Turn away from evil and do good. Seek peace and pursue it.

– Psalm 34:14

Christians need not be ashamed of protecting peace and punishing wickedness during times of war.

And I looked and arose and said to the nobles and to the officials and to the rest of the people, “Do not be afraid of them. Remember the Lord, who is great and awesome, and fight for your brothers, your sons, your daughters, your wives, and your homes.”

– Nehemiah 4:14



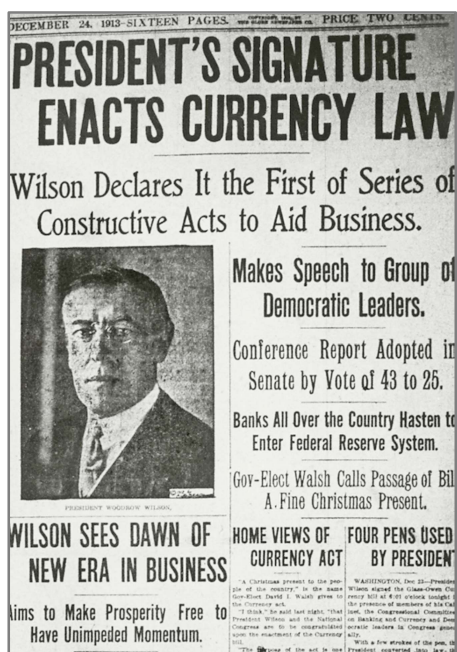
Grave implications of Archduke Franz Ferdinand's assassination were immediately recognized, as in this 29 June article with subtitles “Martial Law Declared in Capital” and “War May Result,” and stating the assassination was “engineered by persons having a more mature organizing ability than that of the youthful assassins.”

Lesson One

History Overview and Assignments President Wilson and Domestic Issues

“The welfare, the happiness, the energy, and the spirit of the men and women who do the daily work in our mines and factories, on our railroads, in our offices and ports of trade, on our farms, and on the sea are the underlying necessity of all prosperity.”

– President Woodrow Wilson



Woodrow Wilson signs creation of the Federal Reserve, December 24, 1913

Key People, Places, and Events

Woodrow Wilson
Underwood Tariff Act of 1913
Federal Reserve Act of 1913
Federal Reserve Board
Farm Loan Act of 1916
Clayton Antitrust Act
Federal Trade Commission
Seamen's Act
Adamson Act of 1916
Jones Law
Porfirio Díaz
Mexican Revolution
Venustiano Carranza
Pancho Villa
Emilio Zapata
Ávaro Obregón

Vocabulary

plight
insurrection

Suggested Reading and Assignments

- Review the discussion questions and vocabulary then read the article: *President Wilson and Issues at Home*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Complete a biography notebook page for **Woodrow Wilson**.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. Enumerate the chief financial measures of the Wilson administration. Review the history of banks and currency and give the details of the Federal Reserve law.
2. What was the Wilson policy toward trusts? Toward labor?
3. What steps were taken in colonial policies? In the Caribbean?
4. What was meant by the newspaper reporter who wrote: "It would be suicidal for America, on the threshold of a great commercial expansion in South America, to suffer a Heligoland, or a Gibraltar, or an Aden to be erected by her rivals at the mouth of her Suez"? Do some additional research to answer this.
5. Describe American-Mexican relations under Wilson.

Adapted for High School from the book:
History of the United States
by Charles A. Beard and Mary R. Beard
President Wilson and Issues at Home

Woodrow Wilson's Administration,
Democratic: 1913-1921

“The welfare, the happiness, the energy, and the spirit of the men and women who do the daily work in our mines and factories, on our railroads, in our offices and ports of trade, on our farms, and on the sea are the underlying necessity of all prosperity.” Thus spoke **Woodrow Wilson** during his campaign for election.

In this spirit, as president, he gave the signal for work by summoning Congress in a special session on April 7, 1913. He invited the cooperation of all “forward-looking men” and indicated that he would assume the role of leadership. As evidence of his resolve, he appeared before Congress in person to read his first message, reviving the old custom of Washington and Adams. Then he let it be known that he would not give his party any rest until it fulfilled its pledges to the country. When Democratic senators balked at tariff reductions, they were sharply informed that the party had **plighted** its word and that no excuses or delays would be tolerated.



Woodrow Wilson sworn in as the
28th President of the United States on March 4, 1913

DOMESTIC LEGISLATION

Financial Measures

Under this spirited leadership Congress went to work, passing first the **Underwood Tariff Act of 1913**, which made a downward revision in the rates of duty, fixing them on the average about 26% lower than the figures of 1907. The protective principle was retained, but an effort was made to permit a moderate element of foreign competition. As a part of this revenue act, Congress levied a tax on incomes as authorized by the Sixteenth Amendment. The tax,

which had roused such party passions twenty years before, was now accepted as a matter of course.

Having disposed of the tariff, Congress took up the old and vexatious currency question and offered a new solution in the form of the **Federal Reserve Act of 1913**. This measure, one of the most interesting in the history of federal finance, embraced four leading features. In the first place, it continued the prohibition on the issuance of notes by state banks and provided for a national currency. In the second place, it put the new banking system under the control of a **Federal Reserve Board** composed entirely of government officials. To prevent the growth of a “central money power,” it provided, in the third place, for the creation of twelve Federal Reserve banks, one in each of twelve great districts into which the country is divided. All local national banks were required, and certain other banks permitted, to become members of the new system and share in its control. Finally, with a view to expanding the currency, a step which the Democrats had long urged upon the country, the issuance of paper money, under definite safeguards, was authorized.

Mindful of the agricultural interest, ever dear to the heart of Jefferson's followers, the Democrats supplemented the Federal Reserve law with the **Farm Loan Act of 1916**, creating federal agencies to lend money on farm mortgages at moderate rates of interest. Within a year \$20,000,000 had been lent to farmers, the heaviest borrowing being in nine western and southern states, with Texas in the lead.

Antitrust Legislation

The tariff and currency laws were followed by three significant measures relative to trusts. Rejecting utterly the Progressive doctrine of government regulation, President Wilson announced that it was the purpose of the Democrats “to destroy monopoly and maintain competition as the only effective instrument of business liberty.” The first step in this direction, the **Clayton Antitrust Act**, carried into great detail the Sherman law of 1890 forbidding and penalizing combinations in restraint of interstate and foreign trade. In every line it revealed a determined effort to tear apart the great trusts and to put all business on a competitive

basis. Its terms were reinforced in the same year by a law creating a **Federal Trade Commission** empowered to inquire into the methods of corporations and lodge complaints against concerns “using any unfair method of competition.”

In only one respect was the severity of the Democratic policy relaxed. An act of 1918 provided that the Sherman law would not apply to companies engaged in export trade, the purpose being to encourage large corporations to engage in foreign commerce with trade essential to the war effort.



Wilson uses tariff, currency, and antitrust laws to prime the pump and get the economy working in this 1913 political cartoon.

The effect of this whole body of antitrust legislation, in spite of much labor on it, remained problematical. Very few combinations were dissolved as a result of it. Startling investigations were made into alleged abuses on the part of trusts; but it could hardly be said that huge business concerns had lost any of their predominance in American industry.

Labor Legislation

By no mere coincidence, the Clayton Antitrust law of 1914 made many concessions to organized labor. It declared that “the labor of a human being is not a commodity or an article of commerce,” and it exempted unions from prosecution as “combinations in restraint of trade.” It likewise defined and limited the uses which the federal courts might make of injunctions in labor disputes and guaranteed trial by jury to those accused of disobedience.

The Clayton law was followed the next year by the **Seamen’s Act** giving greater liberty of contract to American sailors and requiring an improvement of living conditions on shipboard. This was such a drastic law that ship owners declared themselves unable to meet foreign competition under its terms, owing to the low labor standards of other countries.

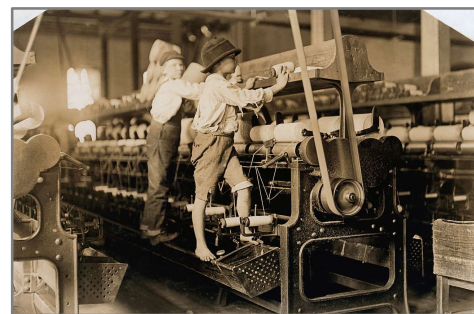
Still more extraordinary than the Seamen’s Act

was the **Adamson Act of 1916** fixing a standard eight-hour workday for trainmen on railroads—a measure wrung from Congress under a threat of a great strike by the four Railway Brotherhoods. This act, viewed by union leaders as a triumph, called forth a bitter denunciation of “trade union domination,” but it was easier to criticize than to find another solution of the problem.

Three other laws enacted during President Wilson’s administration were popular in the labor world. One of them provided compensation for federal employees injured in the discharge of their duties. Another prohibited the labor of children under a certain age in the industries of the nation. A third prescribed for coal miners in Alaska an eight-hour day and modern safeguards for life and health. There were positive proofs that organized labor had obtained a large share of power in the councils of the country.

Federal and State Relations

If the interference of the federal government with business and labor represented a departure from the old idea of “the less government the better,” what can be said of a large body of laws affecting the rights of states? The prohibition of child labor everywhere was one indication of the new tendency. Mr. Wilson had once declared such legislation unconstitutional; the Supreme Court declared it unconstitutional; but Congress, undaunted, carried it into effect under the guise of a tax on goods made by children below the age limit. There were other indications of the shift toward greater federal control.



Child laborers, Macon, Georgia (1909)

Large sums of money were appropriated by Congress in 1916 to assist the states in building and maintaining highways. This occurred in the same year that the Farm Loan Act projected the federal government into the sphere of local money lending. In 1917 millions of dollars were granted to states in aid of vocational education, incidentally imposing

uniform work standards throughout the country. Evidently the government was no longer limited to the duties of the policeman.

COLONIAL AND FOREIGN POLICIES

The Philippines and Puerto Rico

Independence for the Philippines and larger self-government for Puerto Rico had been among the policies of the Democratic Party since the campaign of 1900. President Wilson in his annual messages urged upon Congress more autonomy for the Filipinos and a definite promise of final independence. The result was the **Jones Law**, an organic act for the Philippines which passed in 1916 and replaced the previous Philippine Organic Act.

Organic Acts

An organic act is a congressional act that establishes terms of government over a US territory. The first organic act was the Northwest Ordinance, passed in 1787 under the Articles of Confederation.

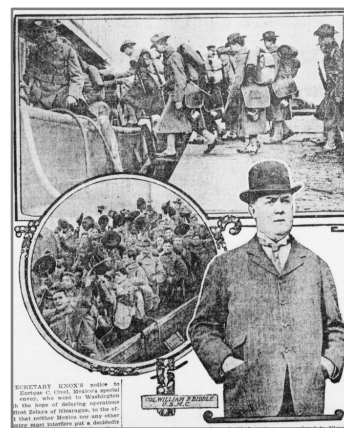
This measure provided that the upper as well as the lower house of the Philippine legislature be elected by popular vote and declared it to be the intention of the United States to grant independence “as soon as a stable government can be established.” This, said President Wilson on signing the bill, is “a very satisfactory advance in our policy of extending to them self-government and control of their own affairs.” The following year Congress, yielding to President Wilson’s insistence, passed a new act for Puerto Rico, making both houses of the legislature elective and conferring American citizenship upon the inhabitants of the island.

American Power in the Caribbean

While extending more self-government to its dominions, the United States enlarged its sphere of influence in the Caribbean. The supervision of finances in Santo Domingo, inaugurated in Roosevelt’s administration, was transformed into a protectorate under Wilson. In 1914 dissensions in the republic led to the landing of American marines to “supervise” the elections. Two years later, an officer in the American navy, with authority from Washington, placed the entire republic “in a state of military occupation.” He proceeded to suspend the government and laws of the country, exile the President, suppress the congress, and substitute

American military authority. In 1919 a consulting board of four prominent Dominicans was appointed to aid the American military governor; but it resigned the next year after making a plea for the restoration of independence to the republic. For all practical purposes, it seemed, the sovereignty of Santo Domingo had been transferred to the United States.

In the neighboring republic of Haiti, a similar state of affairs existed. In the summer of 1915, a revolution broke out there—one of a long series beginning in 1804—and American marines were landed to restore order. Elections were held under the supervision of American officers, and a treaty was drawn up placing the management of Haitian finances and the local constabulary under American authority. In taking this action, the American secretary of state was careful to announce: “The United States government has no purpose of aggression and is entirely disinterested in promoting this protectorate.” Still, it must be said that there were vigorous protests on the part of the indigenous population and American citizens against the conduct of American agents on the island. In 1921 President Wilson considered withdrawal, but US marines would remain stationed in the country until 1934.



US Marines leaving New York City in 1909 for deployment in Nicaragua. Then-Colonel William P. Biddle, in charge of the detachment, is in civilian clothes at right.

In line with American policy in the West Indian waters was the purchase in 1917 of the Danish islands just off the coast of Puerto Rico. The strategic position of the islands, especially in relation to Haiti and Puerto Rico, had made them an object of American concern as early as 1867, when a treaty of purchase was negotiated only to be rejected by the Senate of the United States. In 1902 a second

arrangement was made, but this time it was defeated by the upper house of the Danish parliament. The third treaty brought an end to fifty years of bargaining and the Stars and Stripes were raised over St. Croix, St. Thomas, St. John, and numerous minor islands scattered about in the neighborhood. "It would be suicidal," commented a New York newspaper, "for America, on the threshold of a great commercial expansion in South America, to suffer a Heligoland, or a Gibraltar, or an Aden to be erected by her rivals at the mouth of her Suez." On the South American mainland, American power was strengthened by the establishment of a protectorate over Nicaragua in 1916.

Mexican Relations

The extension of American enterprise southward into Latin America, of which the operations in the Caribbean regions were merely one phase, naturally carried Americans into Mexico to develop the natural resources of that country. Under the iron rule of General **Porfirio Díaz**, established in 1876 and maintained with only a short break until 1911, Mexico had become increasingly attractive to American business owners. On the invitation of President Díaz, they had invested huge sums in Mexican lands, oil fields, and mines, and had laid the foundations of a new industrial order. The severe regime instituted by Díaz, however, stirred popular discontent. The common man demanded the breakup of the great estates, some of which had come down from the days of Cortes. Their clamor for "the restoration of the land to the people could not be silenced." In 1911 Díaz was forced to resign and left the country.



General Porfirio Díaz, President of Mexico

Mexico now slid down the path to disorder, leading to the **Mexican Revolution**, a conflict that lasted most of a decade and resulted in the establishment of the Mexican Constitution in 1917.

A liberal president, Francisco Madero, installed as the successor to Díaz, was deposed in 1913 and brutally murdered. Victoriano Huerta, a military adventurer, hailed for a time as another "strong man," succeeded Madero whose murder he was accused of instigating. Although Great Britain and nearly all the powers of Europe accepted the new government as lawful, the United States steadily withheld recognition. In the meantime, Mexico was torn by **insurrections** under the leadership of **Venustiano Carranza**, a friend of Madero, **Pancho Villa**, a bandit of generous pretensions, and **Emilio Zapata**, a radical leader. Without the support of the United States, Huerta was doomed.



Cartoon depicting Uncle Sam entering Mexico in 1916 to punish Pancho Villa

In the summer of 1914, the dictator resigned and fled from the capital, leaving the field to Carranza. For six years the new president, recognized by the United States, held a precarious position which he vigorously strove to strengthen against various revolutionary movements. At length in 1920, he too was deposed and murdered, and another military chieftain, **Álvaro Obregón**, installed in power.

These events right at America's doorstep could not fail to involve the government of the United States. In the disorders many American citizens lost their lives. American property was destroyed, and land owned by Americans was confiscated. A new Mexican constitution, in effect nationalizing the natural resources of the country, struck at the rights of foreign investors. Moreover, the Mexican border was in constant turmoil. Even in the last days of his administration, Mr. Taft had felt compelled to issue a solemn warning to the Mexican government protesting against the violation of American rights.

President Wilson, soon after his inauguration, sent a commissioner to Mexico to inquire into the situation. Although he declared a general policy of "watchful waiting," he twice came to blows with

Mexican forces. In 1914 some American sailors at Tampico were arrested by a Mexican officer; the Mexican government, although it immediately released the men, refused to make the required apology for the incident. As a result, President Wilson ordered the landing of American forces at Veracruz and the occupation of the city. A clash of arms followed in which several Americans were killed. War seemed inevitable, but at this juncture the governments of Argentina, Brazil, and Chile tendered their good offices as mediators. After a few weeks of negotiation, during which Huerta was forced out of power, American forces were withdrawn from Veracruz and the incident closed.

In 1916 a second break in amicable relations occurred. In the spring of that year a band of Villa's men raided the town of Columbus, New Mexico, killing several citizens and committing robberies.



Pancho Villa and followers

A punitive expedition under the command of General Pershing was quickly sent out to capture the offenders. Against the protests of President Carranza, American forces penetrated deeply into Mexico without success. This operation lasted until January 1917, when the imminence of war with Germany led to the withdrawal of the American soldiers. Friendly relations were resumed with the Mexican government, and the policy of “watchful waiting” was resumed.

Lesson Two

History Overview and Assignments The Outbreak of World War I

ON JUNE 28, 1914, Archduke Franz Ferdinand, the heir to the Austro-Hungarian throne, was assassinated in Sarajevo, the capital of Bosnia, an Austrian province occupied mainly by Serbs. Because of underlying conflicts among European nations, and because the nations involved in the assassination were all allied with others, the incident led to the start of World War I.



The first page of the edition of the *Domenica del Corriere*, an Italian paper, with a drawing by Achille Beltrame depicting Gavrilo Princip killing Archduke Francis Ferdinand of Austria in Sarajevo

Suggested Reading and Assignments

- Review the discussion questions then read the article:
The United States and World War I, Part One.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

Franz Ferdinand
Gavrilo Princip
Triple Alliance
Triple Entente
Woodrow Wilson
Wilhelm II

Discussion Questions

1. What event triggered the outbreak of war in Europe?
2. What underlying political issues were involved?
3. What underlying moral issues were involved?
4. What were the two major alliances called at the start of the war? List the countries included in each.
5. Account for the divided state of opinion in America regarding the two European alliances.

Adapted for High School from the book:

History of the United States

by Charles A. Beard and Mary R. Beard

The United States and World War I, Part One

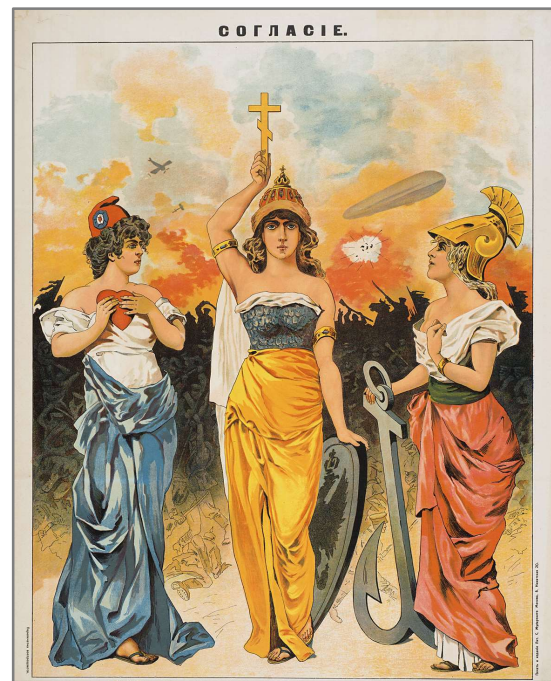
Outbreak of the “Great War”

In the opening days of August 1914, the age-long jealousies of European nations, sharpened by new imperial ambitions, broke out in another general conflict such as had shaken the world in the days of Napoleon. It was known at first as the “Great War,” and later on it was called “World War I.” The way it came about was this: on June 28, 1914, Archduke **Franz Ferdinand**, the crown prince of Austria-Hungary, was shot and killed by a young Yugoslav nationalist named **Gavrilo Princip**, whose underground group sought Yugoslavian independence from Austria-Hungary to join with Austria’s enemy Serbia and unite the southern Slavic peoples. Austria-Hungary, wanting to stop this agitation for independence, used the assassination as a pretext to invade Serbia.

Germany, linked with Austria-Hungary and Italy in an alliance called the **Triple Alliance**, proposed that the issue should be regarded as “an affair which should be settled solely between Austria-Hungary and Serbia,” meaning that the small nation of Serbia should be left to the mercies of a great, hostile power. Russia, united with the United Kingdom and France in an alliance called the **Triple Entente**, refused to take this view (*entente* is a French word that means “alliance”). Great Britain proposed a settlement by mediation, while Germany backed up Austria to the limit. To use the language of the German authorities: “We were perfectly aware that a possible warlike attitude of Austria-Hungary against Serbia might bring Russia upon the field and that it might therefore involve us in a war, in accordance with our duties as allies. We could not, however, in these vital interests of Austria-Hungary which were at stake, advise our ally to take a yielding attitude not compatible with his dignity nor deny him our assistance.” That made the war inevitable.

On the 28th of July, the Austro-Hungarians fired the first shots, preparing to invade Serbia. After that,

every day in the fateful August of 1914 was crowded with momentous events. On the 1st, Germany declared war on Russia. On the 2nd, the Germans invaded the little duchy of Luxembourg and notified the King of Belgium that they were preparing to violate the neutrality of his realm on their way to Paris.



A 1914 Russian poster in which the upper inscription reads “Concord.” Shown are the female personifications of France, Russia, and Britain, the Triple Entente allies in the first World War.

On the same day Great Britain, anxiously besought by the French government, promised the aid of the British navy if German warships made hostile demonstrations in the English Channel. On August 3rd, the German government declared war on France. The following day, Great Britain demanded of Germany respect for Belgian neutrality and, failing to receive the guarantee, broke off diplomatic relations. On the 5th, the British prime minister

announced that war had opened between England and Germany. The storm now broke in all its pitiless fury.



The Chain of Friendship, an American editorial cartoon depicting the supposed web of alliances

The State of American Opinion

Although President **Woodrow Wilson** promptly proclaimed the neutrality of the United States, the sympathies of a large majority of the American people were without doubt on the side of Great Britain and France. To them the invasion of the little kingdom of Belgium and the horrors that accompanied German occupation were odious in the extreme. Moreover, they regarded the German imperial government as an autocratic power wielded in the interest of an ambitious military party. The Kaiser **Wilhelm II** and the crown prince were the symbols of royal arrogance. On the other hand, many Americans of German descent, in memory of their ties with the Fatherland, openly sympathized with the Triple Alliance; and many Americans of Irish descent, recalling their long and bitter struggle for

home rule in Ireland, would have regarded British defeat as a merited redress of ancient grievances.

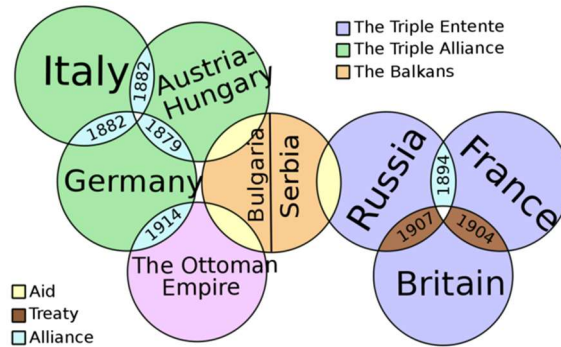
Extremely sensitive to American opinion but ill-informed about it, the German government soon began systematic efforts to present its cause to the people of the United States in the most favorable light possible. The former colonial secretary of the German Empire was sent to America as a special agent. For months he filled the newspapers, magazines, and periodicals with interviews, articles, and notes on the justice of the Teutonic (German) cause. From a press bureau in New York flowed a stream of pamphlets, leaflets, and cartoons. A magazine, *The Fatherland*, was founded to secure “fair play for Germany and Austria.” Several professors in American universities, who had received their training in Germany, took up the pen in defense of the Triple Alliance. The German language press, without exception it seems, the National German Alliance, minor German societies, and Lutheran churches came to the support of the German cause. Even the English language papers, though generally favorable to the Entente Allies, opened their columns in the interest of equal justice to the spokesmen for all the contending powers of Europe.

Before two weeks had elapsed, the controversy had become so intense that President Wilson (August 18, 1914) was moved to caution his countrymen against falling into angry disputes. “Every man,” he said, “who really loves America will act and speak in the true spirit of neutrality which is the spirit of impartiality and fairness and friendliness to all concerned. . . . We must be impartial in thought as well as in action, must put a curb upon our sentiments as well as upon every transaction that might be construed as a preference of one party to the struggle before another.”

Lesson Three

History Overview and Assignments Early Events of World War I

FOLLOWING THE OUTBREAK of war in August 1914, the German Army opened the Western Front by invading Luxembourg and Belgium but were forced back with the Battle of the Marne. Germany attacked Luxembourg on August 2 and on August 3 declared war on France. On August 4, after Belgium refused to permit German troops to cross its borders into France, Germany declared war on Belgium as well. Britain declared war on Germany on the same day.



Web of Alliances: European diplomatic alignments shortly before the outbreak of WWI.
CC BY-SA: Attribution-ShareAlike

Suggested Reading and Assignments

- Read the article: *Events of World War I*.
- Narrate about today's reading using the appropriate notebook page. Be sure include key people, events, and dates within the narration.
- Instead of answering discussion questions, create an alphanumeric outline of the strategies and events described in today's reading, using the method described on your **ArtiosHCS** curriculum website.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

Siege of Liège
Battle of the Frontiers
First Battle of the Marne

Western Front
First Battle of Ypres

Battle of the Somme
Second Battle of Ypres

Adapted for High School from:
Lumen Boundless US History
source: courses.lumenlearning.com
Events of World War I
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The Siege of Liège

At the outbreak of the First World War, the German Army (consisting in the west of seven field armies) executed a plan to quickly attack France through neutral Belgium before turning southward to encircle the French Army on the German border. Belgium's neutrality was guaranteed by Britain under the 1839 Treaty of London; this caused Britain to join the war at the expiration of its ultimatum at 11 p.m. GMT on August 4, 1914, when armies under German generals Alexander von Kluck and Karl von Bülow attacked Belgium. Luxembourg had been occupied without opposition on August 2. The first battle in Belgium was the **Siege of Liège**, which lasted from August 5-16. Liège was well-fortified and surprised the German Army under von Bülow with its level of resistance. Nonetheless, German heavy artillery was able to demolish the main forts within a few days. Following the fall of Liège, most of the

Belgian field army retreated to Antwerp, leaving the garrison of Namur isolated, with the Belgian capital, Brussels, falling to the Germans on August 20. Although the German army bypassed Antwerp, it remained a threat to their flank. Another siege followed at Namur, lasting from about August 20-23.

For their part, the French had five armies deployed on their borders. The pre-war French offensive plan, Plan XVII, intended to capture Alsace-Lorraine following the outbreak of hostilities. On August 7, the VII Corps attacked Alsace with the objective to capture Mulhouse and Colmar. The main offensive was launched on August 14 with 1st and 2nd Armies attacking toward Sarrebourg-Morhange in Lorraine. In keeping with their plan, the Germans withdrew slowly while inflicting severe losses upon the French. The French advanced the 3rd and 4th Armies toward the Saar River and attempted to capture Saarburg, attacking Briey and Neufchateau,

before being driven back. The French VII Corps captured Mulhouse after a brief engagement on August 7, but German reserve forces engaged them in the Battle of Mulhouse and forced a French retreat.

Battle of the Frontiers

The German army swept through Belgium, executing civilians and razing villages. The application of “collective responsibility” against a civilian population further galvanized the allies, and newspapers condemned the German invasion and the army’s violence against civilians and property, together called the “Rape of Belgium.” After marching through Belgium, Luxembourg, and the Ardennes, the German army advanced in the latter half of August into northern France, where they met the French army under Joseph Joffre and the initial six divisions of the British Expeditionary Force under Sir John French. A series of engagements known as the **Battle of the Frontiers** ensued, which included the Battle of Charleroi and the Battle of Mons. In the former battle the French Fifth Army was almost destroyed by the German 2nd and 3rd Armies, and the latter delayed the German advance by a day. A general Allied retreat followed, resulting in more clashes at the Battle of Le Cateau, the Siege of Maubeuge, and the Battle of St. Quentin (also called the First Battle of Guise).

First Battle of the Marne

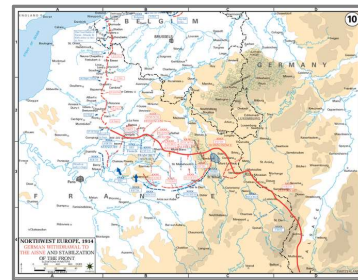
The German Army came within 43 miles of Paris, but at the **First Battle of the Marne** (September 6-12), French and British troops were able to force a German retreat by exploiting a gap that appeared between the 1st and 2nd Armies, ending the German advance into France. The German Army retreated north of the Aisne River, establishing the beginnings of a static **Western Front** that would last for the next three years. Following this German retirement, the opposing forces executed reciprocal outflanking maneuvers known as the “Race for the Sea,” and quickly extended their trench systems from the Swiss frontier to the North Sea. The territory occupied by Germany held 64 percent of French pig-iron production, 24 percent of its steel manufacturing, and 40 percent of the coal industry, dealing a serious blow to French industry.

The First Battle of Ypres

On the Entente side (those countries opposing the German alliance), the final lines were occupied

by the armies of the allied countries, with each nation defending a part of the front. From the coast in the north, the primary forces were from Belgium, the British Empire, and France. Following the Battle of the Yser in October, the Belgian army controlled a 22-mile length of West Flanders along the coast known as the Yser Front, along the Yser River and the Yperlee Canal from Nieuwpoort to Boesinghe. Stationed to the south was the sector of the British Expeditionary Force (BEF).

From October 19 until November 22, the German forces made their final breakthrough attempt of 1914 during the **First Battle of Ypres**. Heavy casualties were suffered on both sides, but no breakthrough occurred. After the battle, Erich von Falkenhayn judged that it was no longer possible for Germany to win the war and on November 18 called for a diplomatic solution, but Chancellor Theobald von Bethmann-Hollweg, Paul von Hindenburg and Erich Ludendorff disagreed.



Map of the Western Front and the Race to the Sea (1914). CC BY-SA: Attribution-ShareAlike

Trench Warfare in World War I

After the German march on Paris was halted at the First Battle of the Marne, both sides dug in along a meandering line of fortified trenches stretching from the North Sea to the Swiss frontier with France. The Western Front settled into a battle of attrition, with a trench line that changed little until 1917.

Trench warfare occurs when a revolution in firepower is not matched by similar advances in mobility, resulting in a grueling form of warfare in which the defender holds the advantage. Military tactics developed before World War I failed to keep pace with advances in technology and became obsolete. These advances had allowed the creation of strong defensive systems, which out-of-date military tactics could not break through for most of the war. Barbed wire was a significant hindrance to massed infantry advances, while artillery vastly more lethal than in the 1870s, coupled with machine guns, made crossing open ground extremely difficult. Commanders on both sides failed to develop tactics

for breaching entrenched positions without heavy casualties. In time, however, technology began to produce new offensive weapons, such as gas warfare and the tank.

On the Western Front in 1914–18, both sides constructed elaborate trench and dugout systems opposing each other along a front, protected from assault by barbed wire, mines, and other obstacles. The area between opposing trench lines (known as “no man’s land”) was fully exposed to artillery fire from both sides. Attacks, even if successful, often sustained severe casualties.

Just after the First Battle of the Marne (September 5-12, 1914), Entente and German forces repeatedly attempted maneuvering to the north in an effort to outflank each other, the strategy that became known as the “Race to the Sea.” When these outflanking efforts failed, the opposing forces soon found themselves facing an uninterrupted line of entrenched positions from Lorraine to Belgium’s coast Britain. France sought to take the offensive while Germany defended the occupied territories. Consequently, German trenches were much better constructed than those of their enemy; Anglo-French trenches were only intended to be “temporary” before their forces broke through the German defenses.

Trench warfare prevailed on the Western Front from late 1914 until the Germans launched their Spring Offensive on March 21, 1918. After the buildup of forces in 1915, the Western Front became a stalemated struggle between equals to be decided by attrition. The small, improvised trenches of the first few months grew deeper and more complex, gradually becoming vast areas of interlocking defensive works. They resisted both artillery bombardment and mass infantry assault. Shell-proof dugouts became a high priority. Frontal assaults and their associated casualties became inevitable because the continuous trench lines had no open flanks. Casualties of the defenders matched those of the attackers, as vast reserves were expended in costly counter-attacks or exposed to the attacker’s massed artillery. There were periods in which rigid trench warfare broke down, such as during the Battle of the Somme, but the lines never moved very far. The war would be won by the side able to commit the last reserves to the Western Front.

Neither side delivered a decisive blow for the next two years. Throughout 1915–17, the British Empire and France suffered more casualties than Germany because of the strategic and tactical stances

chosen by the sides. Strategically, while the Germans mounted only one major offensive, the Allies made several attempts to break through the German lines.

In February 1916, the Germans attacked the French defensive positions at Verdun. Lasting until December 1916, the battle saw initial German gains before French counter-attacks returned them near their starting point. Casualties were greater for the French, but the Germans bled heavily as well, with anywhere from 700,000 to 975,000 casualties suffered between the two combatants. Verdun became a symbol of French determination and self-sacrifice.

The Battle of the Somme

The **Battle of the Somme** was an Anglo-French offensive of July to November 1916. The opening of this offensive (July 1, 1916) saw the British Army endure the bloodiest day in its history, suffering 57,470 casualties, including 19,240 dead, on the first day alone. The entire Somme offensive cost the British Army some 420,000 casualties. The French suffered another estimated 200,000 casualties and the Germans an estimated 500,000.

The last large-scale offensive of this period was a British attack (with French support) at Passchendaele (July–November 1917). This offensive opened with great promise for the Allies before bogging down in the October mud. Casualties, though disputed, were roughly equal at some 200,000–400,000 per side.

These years of trench warfare in the West saw no major exchanges of territory and, as a result, are often thought of as static and unchanging. However, throughout this period, British, French, and German tactics constantly evolved to meet new battlefield challenges.



Trenches of the 11th Cheshire Regiment at Ovillers la-Boisselle, on the Somme, July 1916. One sentry keeps watch while the others sleep.

Photo by Ernest Brooks. CC BY-SA: Attribution-ShareAlike

Development of Advanced Weaponry

Both sides tried to break the trench stalemate using scientific and technological advances. On April

22, 1915, at the **Second Battle of Ypres**, the Germans (violating the Hague Convention) used chlorine gas for the first time on the Western Front. After a two-day bombardment, the Germans released a cloud of 171 tons of chlorine gas onto the battlefield. Though primarily a powerful irritant, it can asphyxiate in high concentrations or prolonged exposure. The gas crept across no man's land and drifted into the French trenches. The green-yellow cloud killed some defenders and those in the rear fled in panic, creating an undefended 3.7-mile gap in the Entente line. The Germans were unprepared for the level of their success and lacked sufficient reserves to exploit the opening. Canadian troops on the right drew back their left flank and repelled the German advance.

The success of this attack would not be repeated, as the Entente countered by introducing gas masks and other countermeasures. The British retaliated, developing their own chlorine gas and using it at the Battle of Loos in September 1915. Fickle winds and

inexperience led to more British casualties from the gas than German. Several types of gas soon became widely used by both sides, and though it never proved a decisive, battle-winning weapon, poison gas became one of the most-feared and best-remembered horrors of the war. French, British, and German forces all escalated the use of gas attacks through the rest of the war, developing the more deadly phosgene gas in 1915, then the infamous mustard gas in 1917, which could linger for days and kill slowly and painfully. Countermeasures also improved and the stalemate continued.

Tanks were developed by Britain and France and were first used in combat by the British during the Battle of Flers–Courcellette (part of the Battle of the Somme) on September 15, 1916, with only partial success. However, their effectiveness would grow as the war progressed; the Allies built tanks in large numbers, whilst the Germans employed only a few of their own design supplemented by captured Allied tanks.

Lesson Four

History Overview and Assignments Threats to America

“On the morning of May 1, 1915, Americans were astounded to see in the newspapers an advertisement, signed by the German Imperial Embassy, warning travelers of the dangers in the war zone and notifying them that any who ventured on British ships into that area did so at their own risk. On that day, the Lusitania, a British steamer, sailed from New York for Liverpool. On May 7, without warning, the ship was struck by two torpedoes and in a few minutes went down by the bow, carrying to death 1,153 persons including 114 American men, women, and children.”

– from the adapted article below



Drawing of the First-class dining room on the *Lusitania*

Suggested Reading and Assignments

- Review the discussion questions and vocabulary then read the article: *The United States and World War I*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

Lusitania

Vocabulary

contraband
temporize

Discussion Questions

1. What leading principles of international law were in place as the war began?
2. Which American rights were assailed in the submarine campaign?
3. What happened to the *Lusitania*?
4. Give Wilson's position on the *Lusitania* affair.
5. How did the world war affect the presidential campaign of 1916?
6. State the American war aims given by the President.

Adapted for High School from the book:

History of the United States
by Charles A. Beard and Mary R. Beard
The United States and World War I

The Clash Over American Trade

As in the time of the Napoleonic wars, the conflict in Europe raised fundamental questions respecting rights of Americans trading with countries at peace as well as those at war. On this point there existed by 1914 a fairly definite body of principles by which nations were bound. Among them the following were of vital significance.

In the first place, it was recognized that an enemy merchant ship caught on the high seas was a legitimate prize of war which might be seized and confiscated. In the second place, it was agreed that “**contraband** of war” found on an enemy or neutral ship was a lawful prize; any ship suspected of carrying it was liable to search and if caught with forbidden goods was subject to seizure. In the third place, international law prescribed that a peaceful merchant ship, whether belonging to an enemy or to a neutral country, should not be destroyed or sunk without provision for the safety of crew and passengers. In the fourth place, it was understood that a belligerent had the right, if it could, to blockade the ports of an enemy and prevent the ingress and egress of all ships.

These general principles left undetermined two important matters: “What is an effective blockade?” and “What is contraband of war?” The task of answering these questions fell to Great Britain as mistress of the seas. Although the German submarines made it impossible for her battleships to maintain a continuous patrol of the waters in front of blockaded ports, she declared this blockade to be nonetheless “effective” because her navy was supreme. As to contraband of war, Great Britain put such a broad interpretation upon the term as to include nearly every important article of commerce. Early in 1915 she declared even cargoes of grain and flour to be contraband, defending the action on the ground that the German government had recently

taken possession of all domestic stocks of corn, wheat, and flour.

A new question arose in connection with American trade with the neutral countries surrounding Germany. Great Britain early on began to intercept ships carrying oil, gasoline, and copper—all war materials of prime military importance—on the ground that they either were destined ultimately to Germany or would release goods for sale to Germans.

On November 2, 1914, the English government announced that the Germans were sowing mines in open waters and that therefore the whole of the North Sea was a military zone. Ships bound for Denmark, Norway, and Sweden were ordered to come by way of the English Channel for inspection and sailing directions. In effect, Americans were now licensed by Great Britain to trade only in certain commodities and in certain amounts with neutral countries.

Against these extraordinary measures, the State Department at Washington lodged pointed objections, saying: “This government is reluctantly forced to the conclusion that the present policy of His Majesty's government toward neutral ships and cargoes exceeds the manifest necessity of a belligerent and constitutes restrictions upon the rights of American citizens on the high seas, which are not justified by the rules of international law or required under the principle of self-preservation.”

Germany Begins a Submarine Campaign

Germany now announced that on and after February 18, 1915, the whole of the English Channel and the waters around Great Britain would be deemed a war zone and that every enemy ship found therein would be destroyed. The German decree added that, since the British admiralty had ordered the use of neutral flags by English ships in time of

distress, neutral vessels would be in danger of destruction if found in the forbidden area. It was clear that Germany intended to employ submarines to destroy shipping.

A new factor was thus introduced into naval warfare, one not provided for in the accepted laws of war. A warship overhauling a merchant vessel could easily take its crew and passengers on board for safekeeping as prescribed by international law; but a submarine ordinarily could do nothing of the sort. Therefore, the lives and the ships of neutrals, as well as of belligerents, were put in mortal peril. This outrageous threat Germany justified on the ground that it was mere retaliation against Great Britain for her violations of international law.

The response of the United States to the ominous German order was swift and direct. On February 10, 1915, it warned Germany that if her commanders destroyed American lives and ships in obedience to that decree, the action would “be very hard indeed to reconcile with the friendly relations happily subsisting between the two governments.” The American note added that the German imperial government would be held to “strict accountability” and all necessary steps would be taken to safeguard American lives and American rights. This was firm and clear language, but the only response which it evoked from Germany was a suggestion that, if Great Britain would allow food supplies to pass through the blockade, the submarine campaign would be dropped.

Violations of American Rights

Meanwhile Germany continued to ravage shipping on the high seas. On January 28, a German raider sank the American ship, *William P. Frye*, in the South Atlantic; on March 28, a British ship, the *Falaba*, was sunk by a submarine and many on board, including an American citizen, were killed; and on April 28, a German airplane dropped bombs on the American steamer *Cushing*.

Sinking of the *Lusitania*

On the morning of May 1, 1915, Americans were astounded to see in the newspapers an advertisement, signed by the German Imperial Embassy, warning travelers of the dangers in the war zone, and notifying them that any who ventured on British ships into that area did so at their own risk. On that day, the *Lusitania*, a British steamer, sailed from New York for Liverpool. On May 7, without warning, the ship was struck by two torpedoes and in

a few minutes went down by the bow, carrying to death 1,153 persons including 114 American men, women, and children.

A cry of horror ran through the country. The German papers in America and a few American people argued that American citizens had been duly warned of the danger and had deliberately taken their lives into their own hands; but the terrible deed was almost universally condemned by public opinion.

The *Lusitania* Notes

On May 14, the State Department at Washington made public the first of three famous notes on the *Lusitania* case. It solemnly informed the German government that “no warning that an unlawful and inhumane act will be committed can possibly be accepted as an excuse or palliation for that act or as an abatement of the responsibility for its commission.” It called upon the German government to disavow the act, make reparation as far as possible, and take steps to prevent “the recurrence of anything so obviously subversive of the principles of warfare.” The note closed with a clear caution to Germany that the government of the United States would not “omit any word or any act necessary to the performance of its sacred duty of maintaining the rights of the United States and its citizens and of safeguarding their free exercise and enjoyment.” The die was cast, but Germany in reply merely **temporized**.

In a second note, made public on June 11, the position of the United States was again affirmed. William Jennings Bryan, the secretary of state, had resigned because the drift of President Wilson’s policy was not toward mediation but the strict maintenance of American rights, if need be, by force of arms. The German reply was still evasive, and German naval commanders continued their course of sinking merchant ships. In a third and final note of July 21, 1915, President Wilson made it clear to Germany that he meant what he said when he wrote that he would maintain the rights of American citizens.

Finally, after much discussion and shifting about, the German ambassador on September 1, 1915, sent a brief note to the secretary of state: “Liners will not be sunk by our submarines without warning and without safety of the lives of non-combatants, provided the liners do not try to escape or offer resistance.” Editorially, the *New York Times* declared: “It is a triumph not only of diplomacy but

of reason, of humanity, of justice, and of truth.” The secretary of state saw in it “a recognition of the fundamental principles for which we have contended.”

The Presidential Election of 1916

In the midst of this crisis came the presidential campaign. On the Republican side everything seemed to depend upon the action of the Progressives. If the breach created in 1912 could be closed, victory was possible; if not, defeat was certain. A promise of unity lay in the fact that the conventions of the Republicans and Progressives were held simultaneously in Chicago. The friends of Roosevelt hoped that both parties would select him as their candidate, but this hope was not realized. The Republicans chose, and the Progressives accepted, Charles E. Hughes, an associate justice of the federal Supreme Court who, as governor of New York, had won a national reputation by waging war on “machine politicians.”

In the face of the clamor for expressions of sympathy with one or the other of the contending powers of Europe, the Republicans chose a middle course, declaring that they would uphold all American rights “at home and abroad, by land and by sea.” This sentiment Mr. Hughes echoed in his acceptance speech. By some it was interpreted to mean a firmer policy in dealing with Great Britain, by others, a more vigorous handling of the submarine menace. The Democrats, on their side, renominated President Wilson by acclamation, reviewed with pride the legislative achievements of the party, and commended “the splendid diplomatic victories of our great president who has preserved the vital interests of our government and its citizens and kept us out of war.”

In the election which ensued, President Wilson’s popular vote exceeded that cast for Mr. Hughes by more than half a million, while his electoral vote stood 277 to 254. The result was regarded, and not without warrant, as a great personal triumph for the President. He had received the largest vote yet cast for a presidential candidate. The Progressive party practically disappeared, and the Socialists suffered a severe setback, falling far behind the vote of 1912.

Progressive Philosophy Evaluation

While the Progressive movement yielded numerous societal benefits, it must be

remembered that these benefits come at the price of larger government with greater governmental control, which contrasts with the small-government objectives sought by America’s founders to safeguard citizen rights. Every increase in governmental control leads to additional increases. Progressives do not usually fear greater governmental control, arguing that the government is controlled by the people. However, the growth of the regulatory bureaucracy needed to administer the progressive changes occurs largely out of the hands of the public, leading to ever-increasing control by high levels of governmental administration. In result, societal choices must be made between the benefits and the increasing loss of freedom that come with progressive philosophy.

President Wilson Urges Peace Upon the Warring Nations

Apparently convinced that his pacific policies had been profoundly approved by his countrymen, President Wilson, soon after the election, addressed “peace notes” to the European belligerents. On December 16, the German emperor proposed to the Allied Powers that they enter into peace negotiations, a suggestion that was treated as a mere political maneuver by the opposing governments. Two days later President Wilson sent a note to the warring nations asking them to avow “the terms upon which war might be concluded.” To these notes the Triple Alliance replied that they were ready to meet their antagonists in a peace conference; and Allied Powers answered by presenting certain conditions precedent to a satisfactory settlement.

On January 22, 1917, President Wilson in an address before the Senate, declared it to be a duty of the United States to take part in the establishment of a stable peace on the basis of certain principles. These were, in short: “peace without victory;” the right of nationalities to freedom and self-government; the independence of Poland; freedom of the seas; the reduction of armaments; and the abolition of entangling alliances.

The whole world was discussing the President’s remarkable message when it was dumbfounded to hear, on January 31, that the German ambassador at Washington had announced the official renewal of ruthless submarine warfare, and soon after that all hope for peace was swept away.

The Artios Home Companion Series

Unit 14: America Enters World War I

Teacher Overview

WORLD WAR I, known at the time as “the Great War” or “the War to End All Wars,” pit more nations of the world against each other than ever before, leading to the deaths of nearly twenty million people and tremendous political upheaval among many of the nations involved.



In Flanders Fields

*In Flanders fields the poppies blow
Between the crosses, row on row,
That mark our place; and in the sky
The larks, still bravely singing, fly
Scarce heard amid the guns below
We are the dead. Short days ago
We lived, felt dawn, saw sunset glow,
Loved, and were loved, and now we lie
In Flanders fields.
Take up our quarrel with the foe:
To you from failing hands, we throw
The torch; be yours to hold it high.
If ye break faith with us who die
We shall not sleep, though poppies grow
In Flanders fields.”*

John McCrae memorialized his comrades who died in the Battle of Ypres in this most famous poem of World War I. Note the different word “grow” on the first page of the autographed book copy.

Suggested Assignments

In this unit, students will:

- Complete two lessons in which they will learn about **America’s entry into World War I** and the **conclusion of the war**, journaling and answering discussion questions as they read.
- Define vocabulary words.
- Research **how film and plays were used** to spread propagational information about the war and be prepared to share.
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

Evil desires stir up conflict.

What causes quarrels and what causes fights among you? Is it not this, that your passions are at war within you?

– James 4:1

Seek, whenever possible, to live in peace.

If possible, so far as it depends on you, live peaceably with all.

– Romans 12:18

Turn away from evil and do good. Seek peace and pursue it.

– Psalm 34:14

Christians need not be ashamed of protecting peace and punishing wickedness during times of war.

And I looked and arose and said to the nobles and to the officials and to the rest of the people, “Do not be afraid of them. Remember the Lord, who is great and awesome, and fight for your brothers, your sons, your daughters, your wives, and your homes.”

– Nehemiah 4:14

Lesson One

History Overview and Assignments The United States Enters the War

ALTHOUGH ISOLATION was a long American tradition, President Wilson considered America's entry into World War I an act of self-defense. Proof of that lay on every hand. Germany had destroyed American lives and American property on the high seas. She had filled American communities with spies. She had planted bombs in ships and munition works. She had fomented divisions among American citizens.

"The world must be made safe for democracy. Its peace must be planted upon the tested foundations of political liberty. We have no selfish ends to serve. We desire no conquest, no dominion. We seek no indemnities for ourselves, no material compensation for the sacrifices we shall freely make. We are but one of the champions of the rights of mankind. We shall be satisfied when those rights have been made as secure as the faith and the freedom of nations can make them."

– Wilson's War Message to Congress: April 2, 1917



Clockwise from the top: The road to Bapaume in the aftermath of the Battle of the Somme (1916). British Mark V tanks crossing the Hindenburg Line (1918). HMS Irresistible sinking after hitting a mine in the Dardanelles (1915). A British Vickers machine gun crew wearing gas masks during the Battle of the Somme (1916). German Albatross D.III biplane fighters near Douai, France (1917)

Key People, Places, and Events

Zimmerman Telegram
Woodrow Wilson
Wilson's Fourteen Points
Liberty Loan
Espionage Act
Sedition Act
Russian Revolution
Nicholas II
Bolshevik
Vladimir Lenin
Red Army
Treaty of Brest-Litovsk
Allied Powers (Allies)
Central Powers
Department of Labor
John J. Pershing
Doughboys
Ferdinand Foch

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article: *The United States at War*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Begin researching **how film and plays were used** to spread propagational information about the war and be prepared to share what you have learned.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Vocabulary

munition
selective draft
progressive tax

armistice
espionage
sedition

insubordination
pogrom
proletariat

onerous
convoy
vanguard

Discussion Questions

1. What proposal was made to Mexico by Germany in the Zimmerman Telegram?
2. What finally caused President Wilson to sever ties with Germany?
3. List five of the ideals listed in President Wilson's Fourteen Points.
4. Describe the selective draft.
5. How did President Wilson call upon the nation to support the war financially? What objection was raised?
6. What types of power and reach did the Espionage and Sedition Acts give the American government?
7. Outline the events of the Russian Revolution.
8. What results came from the Treaty of Brest-Litovsk?
9. How did President Wilson secure the support of the labor unions?
10. What role did the US Navy play in the First World War?
11. What role did General John J. Pershing play in the First World War?
12. How many American lives were lost during the First World War?

Adapted for High School from the book:
History of the United States
by: Charles A. Beard and Mary R. Beard
The United States at War

In the early days of the war, American leaders decided it was in the national interest to continue trade with all sides as before. But a major part of the British strategy was to impose a blockade on Germany. American trade with the German side simply could not be permitted. The results of the blockade were astonishing. American trade with England and France more than tripled between 1914 and 1916, while trade with Germany was cut by over ninety percent. It was this situation that prompted submarine warfare by the Germans against Americans at sea, and this, along with many other German atrocities, demanded a response from the US.

*In January of 1917, British intelligence intercepted and decoded a message sent by Germany seeking support from Mexico if America entered the war. Germany was promising Mexico a return of Texas, New Mexico, and Arizona—territories it had lost in 1848. Relations between the US and Mexico at this time were already strained. Despite this, the Mexican government declined Germany's offer. In a calculated move, President Woodrow Wilson released the captured message, called the **Zimmerman Telegram**, to the press.*

Steps Toward War

Three days after receiving the news that the German government intended to return to its former submarine policy, President **Woodrow Wilson** severed diplomatic relations with the German Empire. At the same time, he explained to Congress that he desired no conflict with Germany and would await an "overt act" before taking further steps to preserve American rights. "God grant," he concluded, "that we may not be challenged to defend them by acts of willful injustice on the part of the government of Germany." Yet the challenge came. Between February 26 and April 2, 1917, six American merchant vessels were torpedoed, in most cases without any warning and without regard to the loss of American lives. President Wilson therefore called upon Congress to answer the German menace.

The reply of Congress on April 6 was a resolution, passed with only a few dissenting votes, declaring the existence of a state of war with Germany. Austria-Hungary at once severed diplomatic relations with the United States; but it

wouldn't be until December 7 that Congress, acting on the President's advice, declared war also on that "vassal of the German government."

American War Aims

In many addresses at the beginning and during the course of the war, President Wilson stated the purposes which actuated the American government in taking up arms. He first made it clear that it was a war of self-defense. "The military masters of Germany," he exclaimed, "denied us the right to be neutral." Proof of that lay on every hand. Agents of the German imperial government had destroyed American lives and American property on the high seas. They had filled American communities with spies. They had planted bombs in ships and **munition** works. They had fomented divisions among American citizens.

Though assailed in many ways and compelled to resort to war, the United States sought no material rewards. "The world must be made safe for democracy," the President asserted. "Its peace must

be planted upon the tested foundations of political liberty. We have no selfish ends to serve. We desire no conquest, no dominion. We seek no indemnities for ourselves.”



The “most famous poster in the world,” by James Montgomery Flagg, Library of Congress

In a remarkable message read to Congress on January 8, 1918, President Wilson laid down his famous **Fourteen Points**, summarizing the ideals for which America was fighting. They included open treaties of peace, openly arrived at; absolute freedom of navigation upon the seas; the removal, as far as possible, of trade barriers among nations; reduction of armaments; adjustment of colonial claims in the interest of the populations concerned; fair and friendly treatment of Russia; the restoration of Belgium; righting the wrong done to France in 1871 in a matter concerning Alsace-Lorraine; adjustment of Italian frontiers along the lines of nationality; more liberty for the peoples of Austria-Hungary; the restoration of Serbia and Romania; the readjustment of the Turkish Empire; an independent Poland; and an association of nations to afford mutual guarantees to all states great and small.

On a later occasion President Wilson elaborated on the last point, namely, the formation of a league of nations to guarantee peace and establish justice among the powers of the world. Democracy, the right of nations to determine their own fate, a covenant of enduring peace—these were the ideals for which the American people were to pour out their blood and treasure.

The Selective Draft

The World War became a war of nations. The powers against which the US arrayed had every able-bodied man in service and all their resources, human and material, thrown into the scale. For this reason, President Wilson summoned the whole people of the United States to make every sacrifice necessary for

victory. Congress by law decreed that the national army should be chosen—by **selective draft**—from all male citizens and males who were not enemy aliens and had declared their intention of becoming citizens. By the first act of May 18, 1917, it fixed the age limits at twenty-one to thirty-one inclusive. Later, in August 1918, it extended them to eighteen and forty-five. From the men of the first group so enrolled were chosen by lot the soldiers for the World War who, with the regular army and the National Guard, formed the American Expeditionary Force upholding the American cause on the battlefields of Europe. “The whole nation,” said the President, “must be a team in which each man shall play the part for which he is best fitted.”

Liberty Loans and Taxes

In order that the military and naval forces should be stinted in no respect, the nation was called upon to place its financial resources at the service of the government. Some urged the “conscription of wealth as well as men,” meaning the support of the war out of taxes upon great fortunes; but more conservative counsels prevailed. Four great **Liberty Loans** were floated, all the agencies of modern publicity being employed to enlist popular interest. The first loan had four and a half million subscribers: the fourth more than twenty million. Combined with loans were heavy taxes. A **progressive tax** was laid upon incomes beginning with four percent on incomes in the lower ranges and rising to sixty-three percent of that part of any income above \$2,000,000. A progressive tax was levied upon inheritances. An excess profits tax was laid upon all corporations and partnerships, rising in amount to sixty percent of the net income in excess of thirty-three percent on the invested capital. “This,” objected a distinguished economist, “is the high-water mark in the history of taxation. Never before in the annals of civilization has an attempt been made to take as much as two-thirds of a man’s income by taxation.”

Mobilizing Material Resources

No stone was left unturned to provide the arms, munitions, supplies, and transportation required in the gigantic undertaking. Between the declaration of war and the **armistice**, Congress enacted law after law relative to food supplies, raw materials, railways, mines, ships, forests, and industrial enterprises. No power over the lives and property of citizens, deemed necessary to the prosecution of the armed conflict, was withheld from the government. The farmer’s

wheat, the household's sugar, coal at the mines, labor in the factories, ships at the wharves, trade with friendly countries, the railways, banks, stores, private fortunes—all were mobilized and laid under whatever obligations the government deemed imperative. Never was a nation more completely devoted to a single cause.

A law of August 10, 1917, gave the President power to fix the prices of wheat and coal and to take almost any steps necessary to prevent monopoly and excessive prices. By a series of measures enlarging the principles of the shipping act of 1916, ships and shipyards were brought under public control and the government was empowered to embark upon a great shipbuilding program. In December of 1917, the government assumed for the period of the war the operation of the railways under a presidential proclamation, which was elaborated in March of 1918 by act of Congress. In the summer of 1918, the express, telephone, and telegraph business of the entire country passed under government control. By war risk insurance acts, allowances were made for the families of enlisted men, compensation for injuries was provided, death benefits were instituted, and a system of national insurance was established in the interest of the men in service. Never before in the history of the country had the government taken such a wise and humane view of its obligations to those who served on the field of battle or on the seas.



WWI-era US victory poster

The Espionage and Sedition Acts

By the **Espionage Act** of June 15, 1917, and the amending law, known as the **Sedition Act**, passed in May of the following year, the government was given a drastic power over the expression of opinion. The first measure penalized those who conveyed information to a foreign country to be used to the injury of the United States, those who made false statements designed to interfere with the military or naval forces of the United States, those who attempted to stir up **insubordination** or disloyalty

in the army and navy, and those who willfully obstructed enlistment. The Sedition Act was still more severe and sweeping in its terms. It imposed heavy penalties upon any person who used “abusive language about the government or institutions of the country.” It authorized the dismissal of any officer of the government who committed “disloyal acts” or uttered “disloyal language,” and empowered the Postmaster General to close the mails to persons violating the law. This measure, prepared by the Department of Justice, encountered vigorous opposition in the Senate, where twenty-four Republicans and two Democrats voted against it. Senator Johnson of California denounced it as a law “to suppress the freedom of the press in the United States and to prevent any man, no matter who he is, from expressing legitimate criticism concerning the present government.” The constitutionality of the acts was attacked; but the new laws were sustained by the Supreme Court and stringently enforced.

The Russian Revolution

*In Russia in the year 1917, a revolution took place in which overthrew Czar **Nicholas II** and forced him to abdicate. This ended more than three hundred years of rule by his family. The czar's grandfather, Alexander II, had allowed serfs (peasant farmers) to buy and own land. They pressed for more reforms, but the Czar refused and was assassinated in 1881. His son, Alexander III, returned to the harsh policies of his earlier ancestors by suppressing revolutionary ideas and persecuting certain ethnic groups to mold Russia into a single nationality. He even killed large groups of Jewish people in massacres called **pogroms**.*

*When Nicholas II became czar, he continued his father's severe policies, and unrest stirred among the people. A group of workers marched before his winter palace demanding reforms such as a national, elected assembly to represent their concerns, but they were met by soldiers who opened fire upon them. Many people were killed on that day, which became known as **Bloody Sunday**. Outraged workers organized into groups called **soviets** and rebelled with uprisings and factory strikes. Government soldiers who were supposed to suppress the uprisings joined with the striking workers instead and forced the czar to abdicate. The following year, Nicholas II was assassinated, along with his family.*

*A provisional government took over for a while during this time, but radical revolutionaries called **Bolsheviks** opposed this government,*

claiming that it was ineffective in solving their problems. The Bolsheviks' leader, **Vladimir Lenin**, ordered the takeover of government office buildings in St. Petersburg, the nation's capital. With very little bloodshed, Lenin seized power and instituted a harsh dictatorship.

Calling themselves Communists, the new government officials organized a military force called the **Red Army**, which quickly crushed all opposition.

The Communist ideas of Karl Marx had been known since 1848, but nowhere in the world until now had a successful Communist revolution taken place. Communism claims that class conflict arises because of friction between the material interests of the **proletariat** (or working class) and the aristocratic class that owns the means of production, and that revolution toward a classless state is inevitable, in which the means of production becomes commonly owned. Unfortunately, communism fails to recognize that man's depravity leads to the rise of new ruling classes that have historically proven to be even more oppressive than the overthrown leaders of the original state.

The Treaty of Brest-Litovsk

The newly established Soviet government decided to end Russia's participation in the war with Germany and its allies. On October 26, 1917, Vladimir Lenin signed the Decree on Peace, which was approved by the Second Congress of the Soviet of Workers', Soldiers', and Peasants' Deputies. The Decree called "upon all the belligerent nations and their governments to start immediate negotiations for peace" and proposed an immediate withdrawal of Russia from World War I.

On December 15, 1917, an armistice between Soviet Russia and Germany was concluded, and fighting stopped. On December 22, peace negotiations began at Brest-Litovsk. The **Treaty of Brest-Litovsk** was signed on March 3, 1918. In making this treaty, Soviet Russia defaulted on all of Imperial Russia's commitments to the Triple Entente alliance.

With the adoption of the Treaty of Brest-Litovsk, the Triple Entente no longer existed, and the British-French alliance became known as the **Allied Powers**, or the **Allies**. Despite this enormous apparent German success, the manpower required for German occupation of former Russian territory may have contributed to the failure of the German alliance, now called the **Central Powers**. The Allied powers led a small-scale invasion of Russia, partly to stop Germany from exploiting

Russian resources, and to a lesser extent, to support the "Whites" (as opposed to the "Reds") in the Russian Civil War.

The Treaty of Brest-Litovsk lasted just over eight months. Germany renounced the treaty and broke diplomatic relations with Soviet Russia on November 5.

– Adapted from *Boundless World History*. Source: Lumenlearning.com

Labor and the War

In view of the restlessness of European labor during the war, and especially the Russian Revolution in 1917, some anxiety was early expressed in America regarding the stand which organized labor might take. It was, however, soon dispelled. Samuel Gompers, speaking for the American Federation of Labor, declared that "this is labor's war," and pledged the united support of all the unions. There was some dissent. The Socialist Party denounced the war as a capitalist quarrel; but all the protests combined were too slight to have much effect. American labor leaders were sent to Europe to strengthen the wavering ranks of trade unionists in war-worn England, France, and Italy. Labor was given representation on the important boards and commissions dealing with industrial questions. Trade union standards were accepted by the government and generally applied in industry. The **Department of Labor** became one of the powerful war centers of the nation. In a memorable address to the American Federation of Labor, President Wilson assured the trade unionists that labor conditions should not be made unduly **onerous** by the war and received in return a pledge of loyalty from the Federation. Recognition of labor's contribution to winning the war was embodied in the treaty of peace, which provided for a permanent international organization to promote the worldwide effort of labor to improve social conditions. "The league of nations has for its object the establishment of universal peace," runs the preamble to the labor section of the treaty, "and such a peace can be established only if it is based upon social justice. . . . The failure of any nation to adopt humane conditions of labor is an obstacle in the way of other nations which desire to improve the conditions in their own countries."

The American Navy in the War

As soon as Congress declared war, the fleet was mobilized, American ports were thrown open to the warships of the Allies, immediate provision was

made for increasing the number of men and ships, and a contingent of war vessels was sent to cooperate with the British and French in their life-and-death contest with submarines. Special effort was made to stimulate the production of “submarine chasers” and “scout cruisers” to be sent to the danger zone. **Convoys** were provided to accompany the transports conveying soldiers to France. Before the end of the war, more than three hundred American vessels and 75,000 officers and men were operating in European waters. Though the German fleet failed to come out and challenge the sea power of the Allies, the battleships of the United States were always ready to do their full duty in such an event. As things turned out, the service of the American navy was limited mainly to helping in the campaign that wore down the submarine menace to Allied shipping.

The War in France

Owing to the peculiar character of the warfare in France, it required a longer time for American military forces to get into action; but there was no unnecessary delay. Soon after the declaration of war, steps were taken to give military assistance to the Allies. The regular army was enlarged, and the troops of the National Guard were brought into national service. On June 13, General **John J. Pershing**, chosen head of the American Expeditionary Forces, reached Paris and began preparations for the arrival of American troops. In June, the **vanguard** of the army reached France.

Doughboys

American soldiers began arriving in France in great numbers in early 1918. The “Doughboys,” as they were called by the French (most likely because they resembled bakers’ young helpers), were young and naïve. Many fell prey to the enticements of Paris nightlife, giving in to various forms of temptation and suffering the consequences, while awaiting transfer to the Front.



Wartime era portrait of a typical American doughboy (c.1918)

A slow but steady stream followed. As soon as the men enrolled under the draft were ready, it became a flood. During the period of the war the army was enlarged from about 190,000 men to 3,665,000, of whom more than 2,000,000 were in France when the armistice was signed.



General John J. Pershing

Although American troops did not take part on a large scale until the last phase of the war in 1918, several trenches by October 1917 and had their first severe encounter with the Germans early in November. In January 1918, they took over a part of the front line as an American sector. In March, General Pershing placed American forces at the disposal of General **Ferdinand Foch**, commander in chief of the Allied armies. The first division, which entered the Montdidier *salient* (a “bulge” of the German army projecting into Allied territory) in April, soon was engaged with the enemy, “taking with splendid dash the town of Cantigny and all other objectives, which were organized and held steadfastly against vicious counterattacks and galling artillery fire.”

When the Germans launched their grand drives toward the Marne and Paris, in June and July 1918, every available man was placed at General Foch’s command. At Belleau Wood, at Château-Thierry, and other points along the deep salient made by the Germans into the French lines, American soldiers distinguished themselves by heroic action. They also played an important role in the counterattack that “smashed” the salient and drove the Germans back.

In September, American troops, with French aid, “wiped out” the German salient at St. Mihiel. By this time General Pershing was ready for the great American drive to the northeast in the Argonne forest, while he also cooperated with the British in the assault on the Hindenburg Line. In the Meuse-Argonne Offensive, American soldiers encountered some of the most severe fighting of the war and

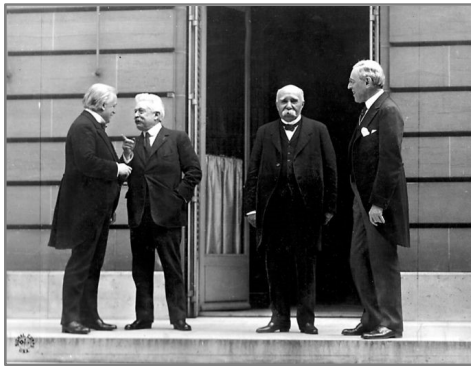
pressed forward steadily against the most stubborn resistance from the enemy. On the 6th of November, reported General Pershing, “a division of the first corps reached a point on the Meuse opposite Sedan, twenty-five miles from our line of departure. The strategic goal which was our highest hope was gained. We had cut the enemy’s main line of communications and nothing but a surrender or an armistice could save his army from complete disaster.” Five days later the end came. On the morning of November 11, the order to cease firing

went into effect. The German army was in rapid retreat and demoralization had begun. The Kaiser had abdicated and fled into Holland. The Hohenzollern dreams of empire were shattered. In the fifty-second month, World War I, involving nearly every civilized nation on the globe, was brought to a close. More than 75,000 American soldiers and sailors had given their lives. More than 250,000 had been wounded or were missing or in German prison camps.

Lesson Two

History Overview and Assignments The Settlement at Paris

WORLD WAR I was settled by the victors at the Paris Peace Conference in 1919. Two dozen nations sent delegations and there were many nongovernmental groups, but the defeated powers were not invited. The “Big Four,” who made all the major decisions, were President Woodrow Wilson of the United States, Prime Minister David Lloyd George of Great Britain, George Clemenceau of France, and Italian Prime Minister Vittorio Orlando. Each major power had its own agenda coming to the Conference, and not every aim was represented in the final treaties. The Paris Peace Conference imposed a series of peace treaties on the Central Powers, officially ending the war. The 1919 Treaty of Versailles dealt with Germany and, building on Wilson’s Fourteen Points, created the League of Nations in June 1919.



The “Big Four” made all the major decisions at the Paris Peace Conference (from left to right, David Lloyd George of Britain, Vittorio Emanuele Orlando of Italy, Georges Clemenceau of France, Woodrow Wilson of the US).

Key People, Places, and Events

Paris Peace Conference
Woodrow Wilson
David Lloyd George
George Clemenceau
Vittorio Orlando
Fourteen Points
League of Nations
Treaty of Versailles

Vocabulary

interventionism
fascism

Suggested Reading and Assignments

- Review the vocabulary and discussion questions then read the article: *The End of World War I*.
- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary word in the context of the reading. Write the word and its definition in the vocabulary section of your history notebook.
- Complete your research on **how film and plays were used** to spread propagational information about the war and share what you have learned.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. What was the purpose of the Paris Peace Conference?
2. Summarize the aims and concerns of the “Big Four” delegations present.
3. Describe fascism and its rise in Italy.
4. In what major way did President Wilson disagree with the French and British ministers?
5. Why were negotiations frustrated concerning the Middle East?
6. Outline the major terms and results of the Treaty of Versailles.
7. List two significant ways in which the treaty was later considered one of the main causes of World War II.
8. Why was the League of Nations rejected by the US Congress?
9. Give a Biblical evaluation of the following statement from today’s reading:
“The logical implication of trying to create a continent neatly divided into coherent territorial states, each inhabited by separate ethnically and linguistically homogeneous population, was the mass expulsion or extermination of minorities. Such was and is the reductio ad absurdum (the carrying of something to an absurd extreme) of nationalism in its territorial version.”
10. What were the primary goals of the League of Nations?
11. Did the League ultimately succeed or fail in these efforts? Why?

Adapted for High School from:

Lumen Boundless World History

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The End of World War I

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The Paris Peace Conference

The **Paris Peace Conference**, also known as Versailles Peace Conference, was the meeting of the Allied victors after the end of World War I to set the peace terms for the defeated Central Powers following the armistices of 1918. It took place in Paris during 1919 and involved diplomats from more than 32 countries and nationalities, including some non-governmental groups, but the defeated powers were not invited.

The “Big Four” present were President **Woodrow Wilson** of the United States, Prime Minister **David Lloyd George** of Great Britain, **George Clemenceau** of France, and Italian Prime Minister **Vittorio Orlando**. They met informally 145 times and made all the major decisions, which in turn were ratified by the others.

The Americans’ vision was set out in Wilson’s **Fourteen Points**, which emphasized free trade, self-determination, and the founding of the **League of Nations** to support territorial and political independence of member nations.

British aims at the conference were focused on securing France, settling territorial disputes, and maintaining their colonial holdings. Having witnessed two German attacks on French soil in the last 40 years, France’s main concern was to ensure Germany would not be able to attack them again, so

they pushed to weaken Germany militarily, strategically, and economically. Italy was motivated by gaining the territories promised by the Allies in the secret Treaty of London.

The conference opened on January 18, 1919. This date was symbolic, the anniversary of the proclamation of William I as German Emperor in 1871 in the Hall of Mirrors at the Palace of Versailles, shortly before the end of the Siege of Paris. This date was also imbued with significance in Germany as the anniversary of the establishment of the Kingdom of Prussia in 1701. Delegates from 27 nations were assigned to 52 commissions that held 1,646 sessions to prepare reports with the help of many experts on topics ranging from prisoners of war to undersea cables to international aviation to responsibility for the war. Key recommendations were folded into the final treaty with Germany, which had 15 chapters and 440 clauses, as well as treaties for the other defeated nations.

American Approach

Wilson’s diplomacy and his Fourteen Points essentially established the conditions for the armistices that brought an end to World War I. Wilson felt it was his duty and obligation to the people of the world to be a prominent figure at the peace negotiations. High hopes and expectations

were placed on him to deliver what he had promised for the post-war era. In doing so, Wilson ultimately began to lead the foreign policy of the United States toward **interventionism**, a move strongly resisted in some domestic circles. Wilson took many domestic progressive ideas and translated them into foreign policy (free trade, open agreements, democracy, and self-determination). One of his major aims was to found the League of Nations “for the purpose of affording mutual guarantees of political independence and territorial integrity to great and small states alike.”

Once Wilson arrived, however, he found “rivalries, and conflicting claims previously submerged.” He mostly tried to sway the direction that the French (Georges Clemenceau) and British (Lloyd George) delegations were taking towards Germany and its allies in Europe, as well as the former Ottoman lands in the Middle East. Wilson’s attempts to gain acceptance of his Fourteen Points ultimately failed after France and Britain refused to adopt some specific points and its core principles.

In Europe, several of his Fourteen Points conflicted with the other powers. The United States did not encourage or believe that the responsibility for the war that Article 231 placed on Germany was fair or warranted. It would not be until 1921 that the United States finally signed separate peace treaties with Germany, Austria, and Hungary.

In the Middle East, negotiations were complicated by competing aims, claims, and the new mandate system. The United States hoped to establish a more liberal and diplomatic world, as stated in the Fourteen Points, where democracy, sovereignty, liberty, and self-determination would be respected. France and Britain, on the other hand, already controlled empires, wielded power over their subjects around the world, and still aspired to be dominant colonial powers.

British Approach

Maintenance of the British Empire’s unity, holdings, and interests was an overarching concern for the British delegates to the conference, with more specific goals of:

- 1) Ensuring the security of France
- 2) Removing the threat of the German High Seas Fleet
- 3) Settling territorial contentions
- 4) Supporting the League of Nations with that order of priority

Convinced that Canada had become a nation on the battlefields of Europe, its Prime Minister, Sir Robert Borden, demanded that it have a separate seat at the conference. This was initially opposed, not only by Britain but also by the United States, which saw a dominion delegation as an extra British vote. Borden responded by pointing out that since Canada had lost nearly 60,000 men, a far larger proportion of its men compared to the 50,000 American losses, at least had the right to the representation of a “minor” power. The British Prime Minister, David Lloyd George, eventually relented, and convinced the reluctant Americans to accept the presence of delegations from Canada, India, Australia, Newfoundland, New Zealand, and South Africa. They also received their own seats in the League of Nations.

David Lloyd George commented that he did “not do badly” at the peace conference, “considering I was seated between Jesus Christ and Napoleon.” This was a reference to the very idealistic views of Wilson on the one hand and the stark realism of Clemenceau, who was determined to see Germany punished.

French Approach

The French Prime Minister, Georges Clemenceau, controlled his delegation. His chief goal was to weaken Germany militarily, strategically, and economically. Having personally witnessed two German attacks on French soil in the last 40 years, he was adamant that Germany should not be permitted to attack France again. In particular, Clemenceau sought an American and British guarantee of French security in the event of another German attack.

Clemenceau also expressed skepticism and frustration with Wilson’s Fourteen Points: “Mr. Wilson bores me with his fourteen points,” complained Clemenceau. “Why, God Almighty has only ten!” Wilson won a few points by signing a mutual defense treaty with France, but back in Washington he did not present it to the Senate for ratification, and it never took effect.

Another alternative French policy was to seek a resumption of harmonious relations with Germany. In May 1919, the diplomat René Massigli was sent on several secret missions to Berlin. During his visits, Massigli offered on behalf of his government to revise the territorial and economic clauses of the upcoming peace treaty.

The Germans rejected the French offers because they considered the French overtures to be a trap to trick them into accepting the Versailles treaty “as is,” and because the German foreign minister, Count Ulrich von Brockdorff-Rantzau, thought that the United States was more likely to reduce the severity of the peace terms than France. It proved to be Lloyd George who pushed for more favorable terms for Germany.

Italian Approach

In 1914 Italy had remained neutral despite its alliances with Germany and Austria. In 1915 it joined the Allies, motivated by gaining the territories promised by the Allies in the secret Treaty of London: the Trentino, the Tyrol as far as Brenner, Trieste, and Istria, most of the Dalmatian coast except Fiume, Valona and a protectorate over Albania, Antalya in Turkey, and possibly colonies in Africa or Asia.

In the meetings of the “Big Four,” in which Orlando’s powers of diplomacy were inhibited by his lack of English, the others were only willing to offer Trentino to the Brenner, the Dalmatian port of Zara and some of the Dalmatian islands. All other territories were promised to other nations and the great powers were worried about Italy’s imperial ambitions. Even though Italy did get most of its demands, Orlando was refused Fiume, most of Dalmatia, and any colonial gain, so he left the conference in a rage.

There was a general disappointment in Italy, which the nationalist and *fascist* parties used to build the idea that Italy was betrayed by the Allies and refused what was due. This led to the general rise of Italian fascism.

Fascism

Fascism is a form of radical, authoritarian nationalism that came to prominence in early 20th-century Europe, characterized by one-party totalitarian regimes run by charismatic dictators, glorification of violence, and racist ideology that exalts a country’s nationality above its people and employs harsh leadership and conquest to expand its power and identity. The first major fascist movements emerged in Italy during World War I, then spread to other European countries. Opposed to liberalism, Marxism, and anarchism, fascism is usually placed on the far-right within the traditional left–right spectrum.

At the outbreak of World War I in August 1914, the Italian political left became severely split

*over its position on the war. The Italian Socialist Party (PSI) opposed the war, but a number of Italian revolutionary syndicalists supported war against Germany and Austria-Hungary on the grounds that their reactionary regimes had to be defeated to ensure the success of socialism. A pro-interventionist fascio called the Fasci of International Action was formed in October 1914. Journalist **Benito Mussolini**, upon expulsion from his position as chief editor of the PSI’s newspaper *Avanti!* for his anti-German stance, joined the interventionist cause in a separate fascio. The term “Fascism” was first used in 1915 by members of Mussolini’s movement, the Fasci of Revolutionary Action.*

The first meeting of the Fasci of Revolutionary Action was held in January 1915 when Mussolini declared that it was necessary for Europe to resolve its national problems—including national borders—of Italy and elsewhere “for the ideals of justice and liberty for which oppressed peoples must acquire the right to belong to those national communities from which they descended.” Attempts to hold mass meetings were ineffective, and the organization was regularly harassed by government authorities and socialists.

Similar political ideas arose in Germany after the outbreak of the war. German sociologist Johann Plenge spoke of the rise of a “National Socialism” in Germany within what he termed the “ideas of 1914” that were a declaration of war against the “ideas of 1789” (the French Revolution). According to Plenge, the “ideas of 1789” that included rights of man, democracy, individualism, and liberalism were being rejected in favor of “the ideas of 1914” that included “German values” of duty, discipline, law, and order. Plenge believed that racial solidarity would replace class division and that “racial comrades” would unite to create a socialist society in the struggle of “proletarian” Germany against “capitalist” Britain. He believed that the “Spirit of 1914” manifested itself in the concept of the “People’s League of National Socialism.”

After the end of the World War I, fascism rose out of relative obscurity into international prominence, with fascist regimes forming most notably in Italy, Germany, and Japan, the three of which would be allied in World War II.

Japanese Approach

The Empire of Japan sent a large delegation headed by former Prime Minister, Marquess Saionji Kinmochi. It was originally one of the “big five” but relinquished that role because of its slight interest in European affairs. Instead, it focused on two

demands: the inclusion of their racial equality proposal in the League's Covenant and Japanese territorial claims with respect to former German colonies, namely Shantung (including Kiaochow) and the Pacific islands north of the Equator (the Marshall Islands, Micronesia, the Mariana Islands, and the Carolines). The Japanese delegation became unhappy after receiving only half of the rights of Germany and walked out of the conference.

Treaty of Versailles

The peace conference's final negotiations dealt with Germany and, building on Wilson's Fourteen Points, created the League of Nations in June 1919.

The major decisions were the establishment of the League of Nations; the five peace treaties with defeated enemies; the awarding of German and Ottoman overseas possessions as "mandates," chiefly to members of the British Empire and to France; reparations imposed on Germany, and the drawing of new national boundaries to better reflect the forces of nationalism. The main result was the **Treaty of Versailles**, with Germany, which in section 231 laid the guilt for the war on "the aggression of Germany and her allies." This provision proved humiliating for Germans and set the stage for very high reparations, though Germany paid only a small portion before reparations ended in 1931.

As the conference's decisions were enacted unilaterally and largely on the whims of the Big Four, for the duration of the Conference Paris was effectively the center of a world government that deliberated over and implemented sweeping changes to the political geography of Europe. Most famously, the Treaty of Versailles itself weakened Germany's military and placed full blame for the war and costly reparations on Germany's shoulders. The humiliation and resentment this caused is sometimes considered the reason for Nazi electoral successes and indirectly, World War II.

The League of Nations proved controversial in the United States, as critics said it subverted the powers of Congress to declare war. The US Senate did not ratify any of the peace treaties and the US never joined the League—instead, the Harding administration of 1921-1923 concluded new treaties with Germany, Austria, and Hungary. Germany was not invited to attend the conference at Versailles. Representatives of White Russia (but not Communist Russia) were present. Numerous other nations sent delegations to appeal for various

unsuccessful additions to the treaties; parties lobbied for causes ranging from independence for the countries of the South Caucasus to Japan's demand for racial equality among the other Great Powers.

Austria-Hungary was partitioned into several successor states, including Austria, Hungary, Czechoslovakia, and Yugoslavia, largely but not entirely along ethnic lines. Transylvania was shifted from Hungary to Greater Romania. The details were contained in the Treaty of Saint-Germain and the Treaty of Trianon. As a result of the Treaty of Trianon, 3.3 million Hungarians came under foreign rule. Although the Hungarians made up 54% of the population of the pre-war Kingdom of Hungary, only 32% of its territory was left to Hungary. Between 1920 and 1924, 354,000 Hungarians fled former Hungarian territories attached to Romania, Czechoslovakia, and Yugoslavia.

The Russian Empire, which had withdrawn from the war in 1917 after the October Revolution, lost much of its western frontier as the newly independent nations of Estonia, Finland, Latvia, Lithuania, and Poland were carved from it. Romania took control of Bessarabia in April 1918.

The Ottoman Empire disintegrated, with much of its Levant territory awarded to various Allied powers as protectorates, including Palestine. The Turkish core in Anatolia was reorganized as the Republic of Turkey. The Ottoman Empire was to be partitioned by the Treaty of Sèvres of 1920. This treaty was never ratified by the Sultan and was rejected by the Turkish National Movement, leading to the victorious Turkish War of Independence and the much less stringent 1923 Treaty of Lausanne.

The Treaty of Versailles was the most important of the peace treaties that brought World War I to an end. It was signed on June 28, 1919, exactly five years after the assassination of Archduke Franz Ferdinand. The other Central Powers on the German side of World War I signed separate treaties. Although the armistice signed on November 11, 1918, ended the actual fighting, it took six months of Allied negotiations at the Paris Peace Conference to conclude the peace treaty. The treaty was registered by the Secretariat of the League of Nations on October 21, 1919.

Of the many provisions in the treaty, one of the most important and controversial required "Germany accept the responsibility of Germany and her allies for causing all the loss and damage" during the war (the other members of the Central Powers

signed treaties containing similar articles). This article, Article 231, later became known as the War Guilt clause. The treaty forced Germany to disarm, make substantial territorial concessions, and pay reparations to certain countries that had formed the Entente powers. In 1921 the total cost of these reparations was assessed at 132 billion marks (then \$31.4 billion, roughly equivalent to USD \$442 billion in 2017). At the time economists, notably John Maynard Keynes, predicted that the treaty was too harsh—a “Carthaginian peace”—and said the reparations figure was excessive and counter-productive, views that have since been the subject of ongoing debate by historians and economists from several countries. On the other hand, prominent figures on the Allied side such as French Marshal Ferdinand Foch criticized the treaty for treating Germany too leniently.

The result of these competing and sometimes conflicting goals among the victors was a compromise that left no one content: Germany was neither pacified nor conciliated, nor was it permanently weakened. The problems that arose from the treaty would lead to the Locarno Treaties, which improved relations between Germany and the other European Powers, and the renegotiation of the reparation system resulting in the Dawes Plan, the Young Plan, and the indefinite postponement of reparations at the Lausanne Conference of 1932.

Historical Assessment

The remaking of the world map at these conferences gave birth to a number of critical conflict-prone international contradictions, which would become one of the causes of World War II. The logical implication of trying to create a continent neatly divided into coherent territorial states, each inhabited by separate ethnically and linguistically homogeneous population, was the mass expulsion or extermination of minorities. Such was and is the *reductio ad absurdum* (the carrying of something to an absurd extreme) of nationalism in its territorial version, although this was not fully demonstrated until the 1940s.

It has long been argued that Wilson’s Fourteen Points, in particular the principle of national self-determination, were primarily anti-Left measures designed to tame the revolutionary fever sweeping across Europe in the wake of the October Revolution and the end of the war by playing the nationalist card.

The League of Nations

The League of Nations was formed to prevent a repetition of the First World War, but within two decades this effort failed. Economic depression, renewed nationalism, weakened successor states, and feelings of humiliation (particularly in Germany) eventually contributed to World War II.

The League of Nations was an intergovernmental organization founded on January 10, 1920, as a result of the Paris Peace Conference that ended the First World War. It was the first international organization whose principal mission was to maintain world peace. Its primary goals, as stated in its Covenant, included preventing wars through collective security and disarmament and settling international disputes through negotiation and arbitration. Other issues in this and related treaties included labor conditions, just treatment of native inhabitants, human and drug trafficking, the arms trade, global health, prisoners of war, and protection of minorities in Europe. At its greatest extent from September 28, 1934, to February 23, 1935, it had 58 members.

The diplomatic philosophy behind the League represented a fundamental shift from the preceding hundred years. The League lacked its own armed force and depended on the Great Powers to enforce its resolutions, keep to its economic sanctions, and provide an army when needed. However, the Great Powers were often reluctant to do so. Sanctions could hurt League members, so they were reluctant to comply. During the Second Italo-Abyssinian War, when the League accused Italian soldiers of targeting Red Cross medical tents, Benito Mussolini responded that “the League is very well when sparrows shout, but no good at all when eagles fall out.”

After a number of notable successes and some early failures in the 1920s, the League ultimately proved incapable of preventing aggression by the Axis powers in the 1930s. Germany withdrew from the League, as did Japan, Italy, Spain, and others.

The onset of the Second World War demonstrated that the League had failed in its primary purpose, the prevention of another world war. There were a variety of reasons for this failure, many connected to general weaknesses within the organization, such as voting structure that made ratifying resolutions difficult and incomplete representation among world nations. Additionally, the power of the League was limited by the United States’ refusal to join.

The Artios Home Companion Series

Unit 15: Aftermath of World War I

Teacher Overview

THE DISSOLUTION of the German, Russian, Austro-Hungarian, and Ottoman empires created a number of new countries in eastern Europe and the Middle East, often with large ethnic minorities. This caused numerous conflicts and hostilities. The United States also faced hard economic times after the war, with problems related to labor, race, and reintegration of veterans. The world needed to turn from a wartime climate to domestic peace.

Meanwhile, America's struggle for women's rights progressed into the twentieth century amid numerous challenges, but the "Great War" and its aftermath provided significant opportunities for women to demonstrate their capabilities as well as their voice demanding fairness and respect. In 1920 the right to vote was finally granted to them by the Nineteenth Amendment.



This map by the prominent British publisher G.W. Bacon & Co., Ltd. shows Europe in the immediate aftermath of World War I. Among the political and territorial changes brought about by the war were the dissolution of the Austro-Hungarian and Ottoman empires, the overthrow of the czarist government in Russia, the establishment or re-establishment of the independent states of Estonia, Latvia, Lithuania, Poland, Czechoslovakia, and Yugoslavia, the transfer of Alsace-Lorraine from Germany to France, and the expansion of Italian territory to include the region around Trieste.

Suggested Assignments

In this unit, students will:

- Complete five lessons in which they will learn about the **aftereffects of World War I on Europe, America's economic, social, and political upheaval following the war, the women's movement as it grew into the twentieth century, and the Nineteenth Amendment**, journaling and answering discussion questions as they read.
- Define vocabulary words.
- Create a bullet point outline, using the method described on the website on their **ArtiosHCS** curriculum website.
- Complete biography notebook pages on **two of the women discussed in Lesson Five**. Research their lives and their contributions to both national politics and general social reform, and specifically their contribution to the women's suffrage movement.
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

God created all human beings equal in His sight. Although we may have different and individual God-ordained purposes, God sees us as equal.

There is neither Jew nor Greek, there is neither slave nor free, there is no male and female, for you are all one in Christ Jesus.

– Galatians 3:28 (review)

Both men and women are precious to God.

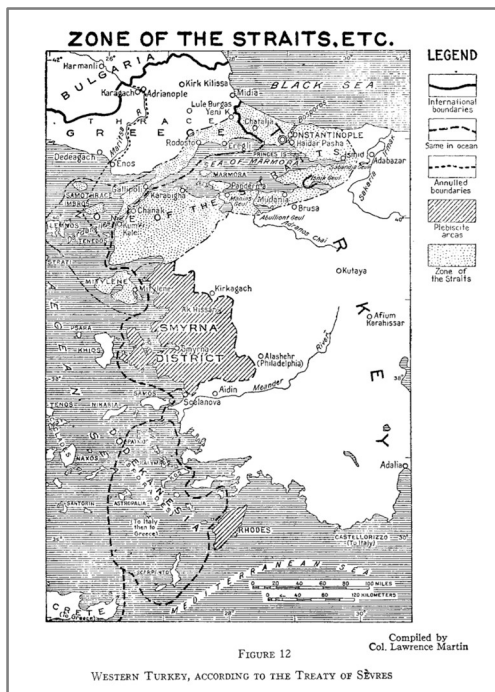
"I will be a father to you, and you shall be sons and daughters to me," says the Lord Almighty.

– 2 Corinthians 6:18

Lesson One

History Overview and Assignments Rebuilding Europe

THE YEARS 1919-24 were marked by turmoil as Europe struggled to recover from the devastation of the First World War and the destabilizing effects of the loss of four large historic empires: the German Empire, Austro-Hungarian Empire, Russian Empire, and the Ottoman Empire. There were numerous new nations in Eastern Europe, most of them small, and efforts were made to prevent future conflicts among their various people groups.



1920 map of Western Turkey, showing the Zone of the Straits in the Treaty of Sèvres, by Lt. Colonel Lawrence Martin, Geographer of the Institute of Politics at Williamstown, MA, 1921-27

Key People, Places, and Events

Weimar Republic
Minority Treaty
Nansen passport
Treaty of Sèvres
Mustafa Kemal Atatürk
Treaty of Lausanne
Irish Republican Army
Irish War of Independence
Sinn Féin
Northern Ireland
Republic of Ireland
Kellogg-Briand Pact

Vocabulary

hyperinflation
latent
rescind
self-determination
contravention

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article: *Rebuilding Europe*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. What was the Weimar Republic?
2. What struggles did this state experience after World War I?
3. What successes did it achieve?
4. Describe the principle of self-determination and its effects on international relations following World War I.
5. What was accomplished by the Treaty of Lausanne? What happened in result regarding Turkey's defeat?
6. Identify several causes of the Kellogg-Briand Pact's ineffectiveness in preventing wars.
7. Describe its enduring diplomatic value despite these incidents of failure.

The Weimar Republic

The victorious allies of WWI imposed harsh reparations on Germany, which were both economically and psychologically damaging. Historians have long argued over the extent to which the reparations led to Germany's severe economic depression in the interwar period.

Weimar Republic is an unofficial historical designation for the German state between 1919 and 1933. The name derives from the city of Weimar, where its constitutional assembly first took place. The official name of the state was still Deutsches Reich; it had remained unchanged since 1871. In English, the country was usually known simply as Germany. A national assembly was convened in Weimar, where a new constitution for the Deutsches Reich was written and adopted on August 11, 1919. In its 14 years, the Weimar Republic faced numerous problems, including **hyperinflation**, political extremism (with paramilitaries—both left- and right-wing); and contentious relationships with the victors of the First World War.

The people of Germany blamed the Weimar Republic rather than their wartime leaders for the country's defeat and for the humiliating terms of the Treaty of Versailles. However, the Weimar Republic government successfully reformed the currency, unified tax policies, and organized the railway system. Weimar Germany eliminated most of the requirements of the Treaty of Versailles; it never completely met its disarmament requirements and eventually paid only a small portion of the war reparations (by twice restructuring its debt through the Dawes Plan and the Young Plan). Under the Locarno Treaties, Germany accepted the western borders of the republic, but continued to dispute the Eastern border.

Challenges and Reasons for Failure

The reasons for the Weimar Republic's eventual collapse are the subject of continuing debate. The Republic in its early years was already under attack from both left- and right-wing sources. The radical left accused the ruling Social Democrats of betraying the ideals of the workers' movement by preventing a Communist revolution and sought to overthrow the

Republic and do so themselves. Various right-wing sources opposed any democratic system, preferring an authoritarian, autocratic state like the 1871 Empire. To further undermine the Republic's credibility, some right-wingers (especially certain members of the former officer corps) also blamed an alleged conspiracy of Socialists and Jews for Germany's defeat in World War I.

The Weimar Republic faced some of the most serious economic problems ever experienced by any Western democracy in history. Rampant hyperinflation, massive unemployment, and a large drop in living standards were primary factors.



Hyperinflation in Weimar Republic: photo shows someone writing on the back of one-million mark notes being used as notepaper.

Provided by: Wikipedia. CC BY-SA: Attribution-ShareAlike

In the first half of 1922, the German mark stabilized at about 320 per dollar. By fall 1922, Germany found itself unable to make reparations payments since the price of gold was now well beyond what it could afford. Also, the mark was by now practically worthless, making it impossible for Germany to buy foreign exchange or gold using paper marks. Instead, reparations were to be paid in goods such as coal. In January 1923, French and Belgian troops occupied the Ruhr, the industrial region of Germany in the Ruhr valley, to ensure reparations payments. Inflation was exacerbated when workers in the Ruhr went on a general strike, and the German government printed more money to continue paying for their passive resistance. In 1919, one loaf of bread cost 1 mark; by 1923, the same loaf of bread cost 100 billion marks.

In 1926, about 2 million Germans were unemployed, which rose to around 6 million in 1932. Many blamed the Weimar Republic. That was made apparent when political parties on both right and left wanting to disband the Republic altogether made

any democratic majority in Parliament impossible.

The reparations damaged Germany's economy by discouraging market loans, which forced the Weimar government to finance its deficit by printing more currency, causing the rampant hyperinflation. In addition, the rapid disintegration of Germany in 1919 by the return of a disillusioned army, the rapid change from possible victory in 1918 to defeat in 1919, and the political chaos may have caused a psychological imprint on Germans that could lead to extreme nationalism, later epitomized and exploited by Hitler.

It is also widely believed that the 1919 constitution had several weaknesses, making the eventual establishment of a dictatorship likely, but it is unknown whether a different constitution could have prevented the rise of the Nazi party.

Self-Determination and New States

The dissolution of the German, Russian, Austro-Hungarian, and Ottoman empires created a number of new countries in eastern Europe and the Middle East, often with large ethnic minorities. This caused numerous conflicts and hostilities.

The years 1919-24 were marked by turmoil as Europe struggled to recover from the devastation of the First World War and the destabilizing effects of the loss of four large historic empires: the German Empire, Austro-Hungarian Empire, Russian Empire, and the Ottoman Empire. There were numerous new nations in Eastern Europe, most of them small.

Most of these new countries had substantial ethnic minorities, who wished to unite with neighboring states where their ethnicity dominated. For example, Czechoslovakia had Germans, Poles, Ruthenians and Ukrainians, Slovaks, and Hungarians. Millions of Germans found themselves in the newly created countries as minorities. More than two million ethnic Hungarians found themselves living outside of Hungary in Slovakia, Romania, and Yugoslavia. Many of these national minorities found themselves in bad situations because the modern governments were intent on defining the national character of the countries, often at the expense of the minorities. The League of Nations sponsored various **Minority Treaties**, or declarations protecting minority rights, in an attempt to deal with the problem and allow countries entry into the League, but after the decline of the League in the 1930s, these treaties became increasingly unenforceable. One consequence of the

massive redrawing of borders and the political changes in the aftermath of World War I was the large number of European refugees. These and the refugees of the Russian Civil War led to the creation of the **Nansen passport**, or refugee travel document.

Ethnic minorities made the location of the frontiers generally unstable. Where the frontiers have remained unchanged since 1918, there has often been the expulsion of an ethnic group, such as the Sudeten Germans. Economic and military cooperation among these small states was minimal, ensuring that the defeated powers of Germany and the Soviet Union retained a **latent** capacity to dominate the region. In the immediate aftermath of the war, defeat drove cooperation between Germany and the Soviet Union, but ultimately these two powers would compete to dominate eastern Europe.

At the end of the war, the Allies occupied Constantinople (Istanbul) and the Ottoman government collapsed. The **Treaty of Sèvres**, a plan designed by the Allies to dismember the remaining Ottoman territories, was signed on August 10, 1920, although it was never ratified by the Sultan.

The occupation of Smyrna by Greece on May 18, 1919, triggered a nationalist movement to **rescind** the terms of the treaty. Turkish revolutionaries led by **Mustafa Kemal Atatürk**, a successful Ottoman commander, rejected the terms enforced at Sèvres and under the guise of General Inspector of the Ottoman Army, left Istanbul for Samsun to organize the remaining Ottoman forces to resist the terms of the treaty.

After Turkish resistance gained control over Anatolia and Istanbul, the Sèvres treaty was superseded by the **Treaty of Lausanne**, which formally ended all hostilities and led to the creation of the modern Turkish Republic. As a result, Turkey became the only power of World War I to overturn the terms of its defeat and negotiate with the Allies as an equal.

Self-Determination

The right of peoples to **self-determination** is a cardinal principle in modern international law. It states that *peoples, based on respect for the principle of equal rights and fair equality of opportunity, have the right to freely choose their sovereignty and international political status with no interference.*

Woodrow Wilson revived America's

commitment to self-determination, at least for European states, during World War I. The end of the war led to the dissolution of the defeated Austro-Hungarian Empire and the creation by the Allies of Czechoslovakia and the union of the State of Slovenes, Croats and Serbs and the Kingdom of Serbia as new states. However, this imposition of states where some nationalities (especially Poles, Czechs, and Serbs and Romanians) were given power over nationalities who disliked and distrusted them eventually helped lead to World War II. Also, Germany lost land after WWI: Northern Slesvig voted to return to Denmark after a referendum. The defeated Ottoman empire was dissolved into the Republic of Turkey and several smaller nations, including Yemen, plus the new Middle East Allied “mandates” of Syria and Lebanon (future Syria, Lebanon, and Hatay State), Palestine (future Transjordan and Israel), Mesopotamia (future Iraq). The League of Nations was proposed as much as a means of consolidating these new states as a path to peace.

During the 1920s and 1930s there were some successful movements for self-determination in the beginnings of the process of decolonization. In the Statute of Westminster, the United Kingdom granted independence to Canada, New Zealand, Newfoundland, the Irish Free State, the Commonwealth of Australia, and the Union of South Africa after the British parliament declared itself as incapable of passing laws over them without their consent. Egypt, Afghanistan, and Iraq also achieved independence from Britain and Lebanon from France. Other efforts were unsuccessful, like the Indian independence movement. Italy, Japan, and Germany all initiated new efforts to bring certain territories under their control, leading to World War II.

Irish War of Independence

*From 1919 to 1921, the **Irish Republican Army (IRA)** fought a guerilla war against British forces. This became known as the **Irish War of Independence**. After unsuccessfully rebelling against British rule in a revolt called the **Easter Rising of 1916**, support rose for Irish independence. In 1918 the republican party called **Sinn Féin** won a landslide victory. The next year they formed a separate government, declaring Irish independence. After two more years of fighting, Ireland was partitioned under British law in May 1921 into **Northern Ireland**, which is part*

*of the United Kingdom, and the **Republic of Ireland**, which is independent.*

The Kellogg-Briand Pact

The **Kellogg-Briand Pact**, with the goal of establishing “the renunciation of war as an instrument of national policy,” has been largely ineffective in preventing conflict or war.

According to the terms of the Kellogg–Briand Pact, which is still in effect, signatory states promise not to use war to resolve “disputes or conflicts of whatever nature or of whatever origin they may be, which may arise among them.” Parties failing to abide by this promise “should be denied of the benefits furnished by this treaty.” It was signed by Germany, France, and the United States on August 27, 1928, and by most other nations soon after. Sponsored by France and the US, the pact renounces the use of war and calls for the peaceful settlement of disputes. Similar provisions were incorporated into the Charter of the United Nations and other treaties, and it became a stepping-stone to a more activist American policy. It is named after its authors, United States Secretary of State Frank B. Kellogg, and French foreign minister Aristide Briand.

After negotiations, the pact was signed in Paris at the French Foreign Ministry by the representatives from Australia, Belgium, Canada, Czechoslovakia, France, Germany, British India, the Irish Free State, Italy, Japan, New Zealand, Poland, South Africa, the United Kingdom, and the United States. It was provided that it would come into effect on July 24, 1929. By that date, Kellogg–Briand Pact had a total of 62 signatories.

In the United States, the Senate approved the treaty overwhelmingly, 85–1, with only Wisconsin Republican John J. Blaine voting against. While the US Senate did not add any reservation to the treaty, it did pass a measure which interpreted the treaty as not infringing upon the United States’ right of self-defense and not obliging the nation to enforce it by taking action against those who violated it.

Effect and Legacy

As a practical matter, the Kellogg–Briand Pact has not lived up to its aim of ending war or stopping the rise of militarism, and in this sense, it made no immediate contribution to international peace and proved to be ineffective in the years to come. Moreover, the pact erased the legal distinction between war and peace because the signatories, having renounced the use of war, began to wage wars

without declaring them, as in the Japanese invasion of Manchuria in 1931, the Italian invasion of Abyssinia in 1935, the Spanish Civil War in 1936, the Soviet invasion of Finland in 1939, and the German and Soviet Union invasions of Poland.

Nevertheless, the pact is an important multilateral treaty because, in addition to binding the particular nations that signed it, it has also

served as one of the legal bases establishing the international norms according to which the threat or use of military force in **contravention** of international law, as well as the territorial acquisitions resulting from it, are unlawful. Notably, the pact has served as the legal basis for the creation of the notion of crime against peace.

Lesson Two

History Overview and Assignments America's Transition to Peace

THE WILSON ADMINISTRATION did not fully plan for the process of demobilization of America's armed forces following World War I, and even with some advisors attempting to direct the President's attention to "reconstruction," his tepid support for a federal commission to oversee the change evaporated after the election of 1918. The combination of a major recession, labor strikes, and social upheaval including race riots, made for a difficult time for the nation.



Uncle Sam, penniless: This political cartoon portrays the impact of World War I on America's economy.

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Key People, Places, and Events

Great Migration
Red Scare of 1919–1920
Union of Soviet Socialist Republics (USSR)
Josef Stalin
Communist Party of the Soviet Union
Palmer Raids
Nicola Sacco
Bartolomeo Vanzetti

Vocabulary

substantiate
syndicalism

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article: *The Transition to Peace: 1919–1921, Part One*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. Outline the causes of the economic recession that followed World War I.
2. What factors led to the Great Migration?
3. Why did Americans come to fear labor unions?
4. Describe the start of the USSR and Josef Stalin's rule.

5. What was the Red Scare of 1919–1920?
6. Trace the origin of the Communist Party of the Soviet Union.

7. In what ways was the American government guilty of overreach during the Red Scare?

Adapted for High School from:

Boundless US History

source: courses.lumenlearning.com

The Transition to Peace: 1919-1921, Part One

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Economic Upheaval During the Transition to Peace

After World War I, America needed to turn from a wartime climate to domestic peace. The Wilson administration's tepid support for a federal commission to oversee the change evaporated after the election of 1918. The combination of a major recession, labor strikes, and social upheaval made for a difficult time for the nation.

Demobilization proved chaotic and violent. Rather than consenting to the appointment of commission members to counter Republican gains in the Senate, Wilson favored the prompt dismantling of wartime boards and regulatory agencies. The military discharged four million soldiers with little planning or money and few benefits. A wartime bubble in farm prices burst, leaving many farmers bankrupt or deeply in debt after purchasing new land. Major strikes in the steel, coal, and meatpacking industries followed in 1919.

An economic recession struck much of the world in the aftermath of World War I. In many countries, especially those in North America, growth was continual during the war as nations mobilized their economies. After the war ended, however, the global economy began to decline. In the United States, 1918–1919 included a modest economic retreat, but the next year saw a mild recovery. Yet a more severe recession hit the United States in 1920 and 1921 when the global economy as a whole fell sharply.

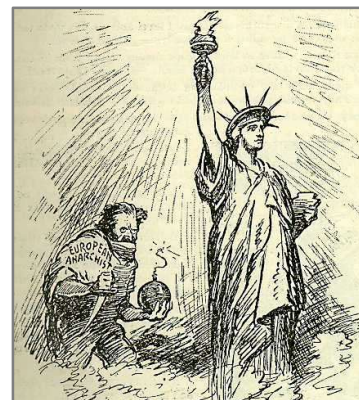
The Great Migration

Rapid demobilization of the military had occurred without plans to absorb veterans, both African American and white. With the manpower mobilization of World War I and immigration from Europe cut off, the industrial cities of the American North and Midwest experienced severe labor shortages. This, along with the removal of price controls, allowed unemployment and inflation to soar. Northern manufacturers recruited throughout the South, and an exodus of workers and their families ensued. By 1919, an estimated 500,000

southern African Americans emigrated to the industrial cities of the North and Midwest in the first wave of the so-called **Great Migration**, which continued until 1940.

Anti-Labor Union Sentiment

The organized labor force during the 1920s also suffered a great deal. Labor unions were considered politically subversive and revolutionary due to their ideological links to the Russian Revolution of workers. The country was fearful of the spread of communism in America, due to the violent overthrow of the government in Russia by Communists, and public opinion hardened against workers who attempted to disrupt the order of the working class. The public was so anti-labor union that in 1922, the Harding administration was able to procure a court injunction to destroy a railroad strike of about 400,000 workers. That same year, the government took part in ending a nationwide strike comprising about 650,000 miners. The federal and state governments had no toleration for strikes and allowed businesses to sue unions for any fiscal damages that occurred during a strike.



“Come Unto Me, Ye Opprest!” This Red Scare depiction of a “European Anarchist” shows him attempting to destroy the Statue of Liberty.

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The Red Scare

Postwar patriotism and fears of communism after the Russian Revolution produced an outbreak

of widespread suspicion in America. The **Red Scare of 1919–1920** had its origins in the hyper-nationalism of World War I and was marked by a widespread dread of Bolshevism and anarchism.

The USSR

After Vladimir Lenin died in 1924, Russia changed its name to the **Union of Soviet Socialist Republics (USSR)**. The new country was made up of fifteen republics, but the domineering national government controlled virtually everything, not allowing the people any part in policy making.

Unlike the American Revolution, in which the new nation had been carefully guided by the Founding Fathers to uphold Judeo-Christian values and follow principles of democracy, the Russian Revolution followed no such principles, and the new government proved to be far more oppressive to the people than the one it had overthrown. Rejecting capitalism (in which the economy is driven by competition between businesses) along with democracy, the Soviet government “nationalized,” or took ownership, of all the nation’s industries. People were forced to work for little pay, with no incentives (rewards) for creative or valuable work. Because people received no benefit from hard work, industrial production and product quality plummeted, and the economy soon began to collapse.

Lenin was followed after his death by **Josef Stalin**, whose rule was even harsher than Lenin’s. Stalin took state ownership of the nation’s farms and set production goals for industry. Some farms and businesses met the government’s demands, but many others did not. Inefficient government management of industries left the nation constantly in short supply of needed goods. Secret police were sent out to force citizens and businesses to comply with the state’s demands. Farming peasants resisted this oppression for a time, but they were soon overpowered and forced into submission.

Stalin ruled by fear, instituting purges, or mass executions, of Communist Party members he suspected of holding disloyal views. Many of the Red Army’s top officers were executed. Many pastors and priests were also killed, and churches were closed because Christian teachings that honored God-fearing leadership and love for fellow man threatened communistic control.

Soviet leaders sought to expand communism throughout the world by promoting revolution. This prompted fear throughout democratic nations, which recognized that communism disguised itself to look like a way to give governmental power to the people, but actually

set up dictators instead. After the German kaiser was defeated in World War I, democratic nations wanted nothing to do with tyrannical government systems.

Concerns about the effects of radical political agitation in American society and its alleged spread in the US labor movement fueled the paranoia that defined the period. This concern was further inflamed following an anarchist bomb plot in 1919; revolution and Bolshevism became the general explanation for all challenges to the social order and were used to excuse even such simple expressions of free speech as the display of certain flags and banners.

The Bolsheviks

Founded by Vladimir Lenin and Alexander Bogdanov, the Bolsheviks, by 1905, were a mass political organization in Russia consisting primarily of workers governed by the principle of democratic centralism. A faction of the Marxist Russian Social Democratic Labor Party (RSDLP), the Bolsheviks had split from the party’s other Socialist faction, the Mensheviks, in 1903 and ultimately became the **Communist Party of the Soviet Union**.

During the Russian Revolution, the czarist autocracy had been dismantled and replaced by Communists. When the Provisional Government chose to continue fighting World War I despite the Russian Army suffering huge losses, the Bolsheviks demanded an immediate end to the war and won over the common people. In the second phase of the revolution, in October 1917, the Bolsheviks led by Lenin overthrew the Provisional Government and appointed themselves leaders of government ministries and seized control of the countryside. The Bolsheviks founded the Russian Soviet Federative Socialist Republic that would, in 1922, become the chief constituent of the Soviet Union.

The Red Scare and Organized Labor

In 1919, American authorities saw the possibility of revolution at home in cases such as the five-day Seattle General Strike in February, during which more than 65,000 workers in several unions struck for higher wages, and the September Boston Police Strike for better wages and working conditions that resulted in several nights of lawlessness and the restoration of order by the state guard.

Newspapers exacerbated those political fears into xenophobia, a fear of people from other nations,

because varieties of radical anarchism were perceived by some as answers to poverty, and anarchism's advocates often were recent European immigrants. Moreover, the press portrayed the Industrial Workers of the World (IWW) support of several labor strikes in 1916 and 1917 as radical threats to American society inspired by left-wing, foreign agents. Thus, the press in 1919 portrayed legitimate labor strikes as “crimes against society,” “conspiracies against the government,” and “plots to establish communism.”



Seattle General Strike headline: The front page of the *Seattle Union Record* newspaper on February 3, 1919, carried a report of the city's general strike.

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In the wake of the Seattle General Strike, the US Senate created a special five-man subcommittee from the panel whose original mandate was to investigate German subversion during World War I. Known as the “Overman Committee,” it was to study efforts to propagate Bolshevism, and in hearings during 1919, it developed an alarming image of Bolshevism as an imminent threat to the US government and American values.

The Palmer Raids

In April 1919, authorities discovered a plot to mail 36 bombs to prominent members of the US political and economic establishment, including J.P. Morgan, John D. Rockefeller, Supreme Court Justice Oliver Wendell Holmes, and immigration officials. US Attorney General Alexander Mitchell Palmer, another target of the mail bombs, attempted to suppress radical organizations through exaggerated rhetoric, illegal search and seizures, unwarranted arrests and detentions, and the deportation of several hundred suspected radicals and anarchists. In June of that year, eight bombs simultaneously exploded in eight cities. Palmer's home in Washington, DC was hit by an explosion that killed the bomber, an Italian-American radical from Philadelphia. American authorities saw the threat of revolution in the bomb campaign, and Palmer

ordered the US Justice Department to launch what became known as the “**Palmer Raids**” in November 1919 and January 1920.

The raids were intended to round up and rid the nation of radical leftists, especially anarchists. Yet fewer than 600 of Palmer's raids were **substantiated** with evidence, and thousands of resident aliens were illegally arrested and deported. Initially the press praised the raids, but they were criticized as unconstitutional by 12 prominent lawyers. Defensively, Palmer warned in 1920 that a left-wing revolution aimed at government overthrow would begin on May 1, known as May Day, the International Workers' Day. When it failed to happen, he was ridiculed and lost much of his remaining credibility. The Red Scare effectively at this point, and in July Palmer's promising Democratic Party bid for the US presidency failed.

Wall Street was indeed bombed, however, on September 1, 1920, near Federal Hall and the JP Morgan Bank. While both anarchists and Communists were suspected, no one was indicted for the bombing.



“Soak it Hard”: In this cartoon, the American Legion prepares to hit a ball labeled “Ball-shevism” with a rifle butt labeled “100 per cent Americanism.” The figure stands above a quote from Theodore Roosevelt, Jr.: “Don’t argue with the reds; go to the bat with them and go to the bat strong!”

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Red Scare Legislation

The anti-immigrant, anti-anarchist Sedition Act of 1918 had been approved in Congress to protect wartime morale by deporting people with undesirable politics. In 1919–20, several states enacted “criminal **syndicalism**” laws outlawing advocacy of violence in effecting and securing social change, which included free speech limitations.

Syndicalism

“A revolutionary doctrine by which workers seize control of the economy and the government by direct means (such as a general strike).”

— Merriam Webster

Passage of these laws provoked aggressive police investigations and unwarranted arrests and deportation of those suspected of Communist or left-wing leanings. Regardless of ideological nuances, the Red Scare did not distinguish between communism, socialism, or social democracy and enabled an overreach of government power while weakening civil liberties in the United States.

The Sacco-Vanzetti Case

On April 15, 1921, two employees of a shoe warehouse in South Braintree, Massachusetts, were murdered during a robbery. The police investigating the crime arrested two Italian immigrants named **Nicola Sacco** and **Bartolomeo Vanzetti**.

Many people, particularly fellow socialists, protested the verdict, asserting the two men were convicted more on political and ethnic prejudice

than on any real evidence. Indeed, four years later, another man confessed he had committed the crime with a local gang.

Despite appeals, Sacco and Vanzetti were never granted a retrial. When they were sentenced to death on April 9, 1927, protests erupted around the country. But this was to no avail—the men were executed on Aug. 23, 1927. They claimed they were innocent until the moment of their deaths.

Scholars still debate the guilt and innocence of Sacco and Vanzetti, but there is little question that the trial was biased against them.

— Adapted from U.S. History Online Textbook



Protest for Sacco and Vanzetti in London (1921)

Lesson Three

History Overview and Assignments Ethnic Tensions

THROUGHOUT THE LATTER half of the nineteenth century and during the early years of the twentieth century, America underwent a series of changes in national demographics that were precipitated by increased Mexican immigration and a Great Migration of African Americans from the South to the northern part of the country. Numerous examples of postwar racial friction, sparked by nativism and the Great Migration, reached a peak in the 1919 Red Summer, during which race riots occurred in more than three dozen cities in the United States.



The Great Migration. Jacob Lawrence’s painting uses abstract images to depict African American migration north.

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Key People, Places, and Events

Immigration Act of 1917	Emergency Quota Act
Great Migration	Immigration Act of 1924
Nativist Movement	Pan-Americanism
Eugenics Movement	Red Summer
Second Ku Klux Klan	Chicago Race Riot

Vocabulary

nativism

eugenics

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article:
The Transition to Peace: 1919-1921, Part Two.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. Why were Mexicans granted many immigration allowances during this era?
2. What events and other factors brought about the Great Migration?
3. Trace the development of the Nativist Movement.
4. What were this movement's objectives regarding immigration?
5. With what was the Eugenics Movement concerned?
6. When and where was the Second Ku Klux Klan founded?
7. Describe the Ku Klux Klan's resurgence and its purpose.
8. Give a Biblical response to this objective.
9. What event triggered the Chicago Race Riot of 1919?

Adapted for High School from:

Boundless US History

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The Transition to Peace: 1919-1921, Part Two

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Mexican Immigration

After the end of the Mexican-American War in 1848, migration from Mexico was not subject to restrictions and Mexicans moved freely and frequently across the border into the United States. Typically, Mexicans moved to work as construction, railway, or seasonal agricultural laborers. The immigration laws of the United States during this time generally allowed exemptions for Mexico, while being more restrictive to citizens of the Eastern Hemisphere.

Mexicans received special allowances due to the importance of Mexican labor to the US economy. One example of these allowances was the **Immigration Act of 1917**, under which all potential immigrants had to pass a literacy test and pay a head tax. At the request of growers in the Southwest who depended on farm labor from Mexico, however, the Secretary of Labor waived these requirements for Mexican immigrants. The abundance of individuals, companies, and groups interested in the availability of inexpensive labor ensured that the immigration laws in place throughout the early twentieth century did not adversely affect the movement of Mexican migrants,

despite calls on the part of some of southern congressmen to put an end to the open border policies.

African American Migration

From 1910 to 1970, approximately 6 million African Americans moved out of the rural southern United States into the Northeast, Midwest, and West in what historians have called the "**Great Migration.**" The Great Migration created the first large urban African American communities in the North. Conservative estimates put at 400,000 the number of African Americans who left the South from 1916 through 1918 to take advantage of a labor shortage following World War I.

Causes and Challenges

When the Emancipation Proclamation was signed in 1863, less than eight percent of the African American population lived in the northeastern or midwestern United States. In 1900, about 90 percent still lived in southern states, largely in rural areas working as sharecroppers. But during the late nineteenth and early twentieth centuries, the boll weevil devastated the American cotton crop, and

farming opportunities for African Americans sharply declined in the South. Between 1910 and 1930, many headed north, increasing the African American population by about 40 percent in northern states, mostly in the major cities. Industrial cities such as Detroit, Chicago, Cleveland, and New York City experienced some of the biggest increases in the early part of the twentieth century. African Americans were also recruited to work on the expansion of the Pennsylvania Railroad.

Because changes were concentrated in cities, which had also attracted millions of new or recent European immigrants, tensions rose with competition for jobs and housing. There was no government assistance, but often northern industries such as the railroads, meatpacking, and stockyards took it upon themselves to recruit workers.



A rise in immigration stirred resentment over economic and social problems.

The primary factors for migration from the South included segregation, widespread racial violence, and a lack of opportunity. In the North, African Americans could find better schools and adult men could vote (joined by women after 1920). Cities that had been virtually all white at the start of the century became centers of African American culture and politics by the middle of the century. Segregation still imposed severe economic and social costs but allowed northern cultural centers to develop an important infrastructure of newspapers, businesses, jazz clubs, churches, and political organizations that provided the staging ground for new forms of racial politics and African American culture.

Racial Friction

Beyond the problems that occurred due to ethnic tensions within America, there was also racial

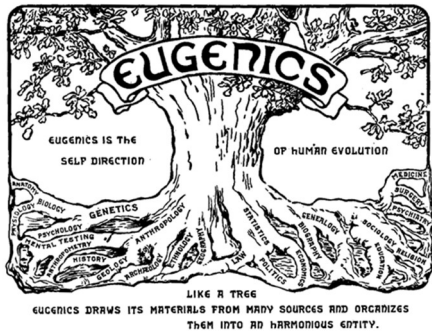
friction resulting in the great influx of European immigrants. This backlash by those born American against people who sought a new life in the United States was known as “**nativism**.”

Nativism in America

The **Nativist Movement** gained its name from the term “Native American,” referring not to indigenous people, but rather to those descended from the inhabitants of the original thirteen colonies. Nativist movements included the Know-Nothing or American Party of the 1850s; the Immigration Restriction League of the 1890s; and the anti-Asian movements in the West, resulting in the Chinese Exclusion Act of 1882 and the “Gentlemen’s Agreement of 1907,” by which Japan’s government stopped emigration to America. Labor unions were strong supporters of limits on immigration because of fears that immigrants would lower wages and make it harder to organize unions.

From 1890 to 1920, nativists and labor unions campaigned for immigration restriction. A favorite plan was the literacy test to exclude workers who could not read or write English. Responding to these demands, opponents of the literacy test called for the establishment of an immigration commission to focus on immigration as a whole. The United States Immigration Commission, also known as the “Dillingham Commission,” was created and tasked with studying immigration and its effect on the United States. The findings of the commission further influenced immigration policy and upheld the concerns of the nativist movement.

Following World War I, nativists focused their attention on Catholics, Jews, and southeastern Europeans, and realigned their beliefs behind racial and religious nativism. The racial concern of the anti-immigration movement was linked closely to the chilling philosophy behind the **Eugenics Movement** that was sweeping the United States. Led by Madison Grant’s book, *The Passing of the Great Race*, nativists grew more concerned about maintaining racial purity in the United States. In his book, Grant argued that Americans should be troubled that their racial stock was being diluted by the influx of new immigrants from the Mediterranean, the Balkans, and the Polish ghettos. *The Passing of the Great Race* achieved wide popularity among Americans and influenced immigration policy. A wide national consensus sharply restricted the overall inflow of immigrants, especially those from southern and eastern Europe.



Logo from the Second International Eugenics Conference, 1921, depicting eugenics as a tree which unites a variety of different fields

Meanwhile, the **Second Ku Klux Klan**, founded on Stone Mountain, Georgia in 1915, was employing violence and strong nativist rhetoric against Jews, African Americans, Catholics, and recently arriving immigrants, but Catholics led a counterattack.

After intense lobbying from the nativist movement, the US Congress passed the **Emergency Quota Act** in 1921. This bill was the first to place numerical quotas on immigration, capping the inflow of immigrants arriving from outside of the Western Hemisphere. However, this bill was only temporary, as Congress began debating a more permanent bill.

The Emergency Quota Act was followed with the **Immigration Act of 1924**, a more permanent resolution. This law-based admission to America on nationality and reduced the number of immigrants able to arrive by about half. Though this bill did not fully restrict immigration, it considerably curbed the flow of immigration into the United States. Immigrants from northern and western Europe were granted higher quotas than from other parts of the world. Asian immigration was banned completely. As a sign of **pan-Americanism**, there were no restrictions placed on immigrants from the Western Hemisphere.

Segregation and Work Competition

Segregation was still a reality, even in the North. As more African Americans moved northward, they encountered racism and had to battle over territory, often against ethnic Irish, who were defending their power bases. While African Americans faced difficulties, their chances were still far better in the North.

African Americans had to make great cultural changes, as most went from rural areas to major

industrial cities, and had to adjust from being rural laborers to urban workers. African American workers filled new positions in expanding industries, such as the railroads, and assumed many jobs formerly held by whites. In some cities, they were hired as strikebreakers, especially during the strikes of 1917. This fostered resentment among many working-class whites, immigrants, or first-generation Americans. Following the war, rapid demobilization of the military without a plan for absorbing veterans into the job market, and the removal of price controls, led to unemployment and inflation, which further increased competition for jobs.

The Red Summer of 1919

At the height of the tensions came the **Red Summer** of 1919, when whites carried out open acts of violence against African Americans, who were forced to fight back. Race riots occurred in more than three dozen cities in the United States during the summer and early autumn of 1919. In most instances, whites fell upon African Americans in mass attacks that developed out of strikes and economic competition.

The **Chicago Race Riot** was the worst example of the mob violence that swept the country. On July 27, 1919, an African American teenager drowned in Lake Michigan after being stoned by a group of whites for violating the unwritten segregation between whites and blacks on the city's beaches. Police refusal to arrest the white man identified by witnesses as the instigator sparked rioting and open violence between African American and white gangs, with most of the unrest occurring on the South Side near the city stockyards. When the rioting and fighting finally ended on the 3rd of August, 15 whites and 23 African Americans were dead, another 500 were injured, and 1,000 African American families had lost their homes to fires set by rioters.



African American race riot: This photo shows a white gang looking for African Americans during the Chicago Race Riot of 1919. A lack of plans for demobilization after World War I exacerbated racial and economic tensions in many cities across the United States.

Lesson Four

History Overview and Assignments The 1918 Flu Pandemic

THE 1918 INFLUENZA pandemic killed millions more people than did the Great War. The 1918 flu was an unusually severe and deadly virus that spread across the world quickly due to the conditions of World War I and an increase in modern travel. World War I produced living conditions in which the flu thrived and spread quickly. The immune systems of soldiers were compromised by stress and malnutrition, leading to the evolution of a more deadly strain of the virus. In August 1918, a stronger strain of normal flu emerged. Rather than affecting typical victims such as the very young and elderly, the new strain killed young, generally healthy adults.



Influenza ward: This photo shows soldiers from Fort Riley, Kansas, ill with influenza at a hospital ward at Camp Funston in 1918, where the worldwide pandemic is hypothesized by some to have begun.

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Carrying out the dead: With masks over their faces, members of the American Red Cross remove a victim of the Spanish flu from a house at Etzel and Page Avenues, St. Louis, Missouri.

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Suggested Reading and Assignments

- Read the article: *The Transition to Peace: 1919-1921, Part Three*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Instead of answering discussion questions, create a bullet point outline of the strategies and events described in today's reading, using the method described on your **ArtiosHCS** curriculum website.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Adapted for High School from:

Boundless US History

source: courses.lumenlearning.com

The Transition to Peace: 1919-1921, Part Three

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The Spanish Flu Pandemic

In 1918, an unusually severe and deadly influenza pandemic that became known as “Spanish flu” or “Spanish influenza” spread across the globe. The majority of victims were healthy, young adults, in contrast to typical influenza outbreaks that predominantly affect infants, elderly, or already weakened patients. An estimated 50 million people died, 34 million more than the number of lives lost in World War I. The virus struck a fifth of the entire

world's population, making it one of the deadliest natural disasters in human history.

Breakout and Transmission

The Spanish flu was an H1N1 influenza virus, which is a subtype of Influenza A with strains that can appear in humans and animals. It first appeared in the late spring of 1918 and, in its first phase, was known as the “three-day fever.” It struck without any warning signs and then dissipated, with victims

recovering within days and only a few deaths being reported. Yet the flu returned with a vengeance as the year progressed. Health officials were taken off guard by the swiftness and severity of its spread and did not know how to treat or control the sickness. Some patients died within hours while others held on for a few days, succumbing to suffocation after their lungs filled with fluid.

In the United States, the disease was first observed in Haskell County, Kansas, in January 1918, prompting a local doctor to warn the US Public Health Service's academic journal. On March 4, 1918, cook Albert Gitchell reported feeling sick at Fort Riley, Kansas. By noon on March 11, 1918, more than 100 soldiers were hospitalized and within days, 522 men at the camp had reported being sick. By March 11, 1918, the virus had spread to Queens, New York. Eventually more than 25 percent of the American population was stricken by the flu, causing such fear that within a single year, US life expectancy figures were lowered by 12 years.

While World War I did not cause the flu, the close quarters in which soldiers were housed increased transmission of the pandemic and amplified the flu's mutation into an increasingly deadly form. Some speculate that the immune systems of soldiers were weakened by malnourishment, while the stress of combat and chemical attacks increased their susceptibility.



Typist wearing a mask to help protect against contagion during the Spanish influenza epidemic.

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Another large factor in the worldwide occurrence of the spread of the flu was increased travel. Modern transportation systems made it easier for soldiers, sailors, and civilian travelers to spread the disease, especially with the increase of troop movements during the war.

In August 1918, a more virulent strain appeared simultaneously in Brest, France; Freetown, Sierra Leone in West Africa; and Boston, Massachusetts in the United States. Allied troops came to call it the

“Spanish flu,” primarily because the pandemic received greater press attention after it moved from France to Spain in November 1918. Spain was not involved in the war and had not imposed wartime censorship.

Deadly Second Wave

The second wave of the pandemic struck in the autumn of 1918 and was much deadlier than the first. The first wave resembled typical flu epidemics in which those most at risk are the sick and elderly, while younger, healthier people recovered easily. But in August 1918, when the second wave began in France, Sierra Leone, and the United States, the virus had mutated into a much deadlier form.

This mutation has been attributed to the circumstances of World War I. In civilian life, evolutionary pressures favor a mild strain of flu: Those who get very sick stay home, and the mildly ill continue with their lives, thereby spreading the mild strain. In the trenches, however, these pressures were reversed: Soldiers with a mild strain remained where they were, while the severely ill were sent on packed trains to overcrowded field hospitals, spreading the deadlier virus.

The second wave began, and the flu quickly spread around the world again. It was the same flu as the first wave, but it was now far more deadly. Most of those who recovered from first-wave infections were immune, but mutation caused the infection to attack adults who, like the soldiers in the trenches, were otherwise young and healthy. Consequently, during modern pandemics, health officials pay attention when a virus reaches places with social upheaval, looking for deadlier strains of the virus to develop. This effect was most dramatically illustrated in Copenhagen, Denmark, which escaped with a combined mortality rate of just 0.29 percent (0.02 percent in first wave and 0.27 percent in second wave) because of exposure to the less-lethal first wave.

End of the Pandemic

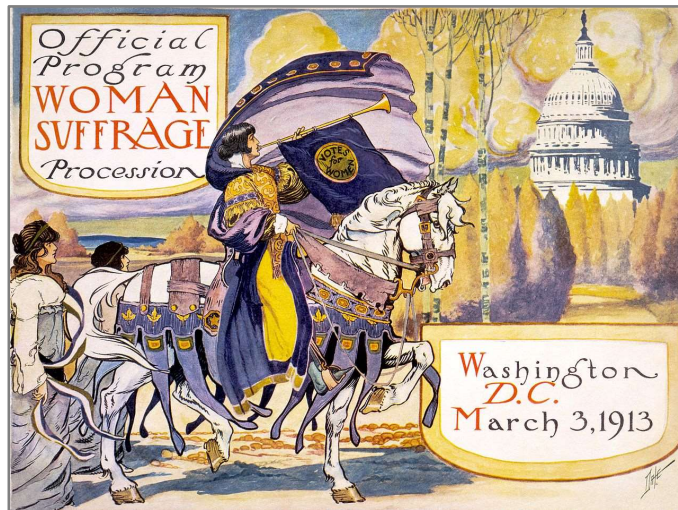
After the deadly second wave, new cases dropped abruptly after the flu's original peak. In Philadelphia, 4,597 people died in the week ending October 16, but by November 11, influenza had almost disappeared from the city. One explanation for the rapid decline of the disease is that doctors simply became more knowledgeable and skilled at preventing and treating the pneumonia that developed after the victims contracted the virus.

Lesson Five

History Overview and Assignments The Struggle For Women's Suffrage

"The position which women enjoy in America today is the result of a slow development from an almost rightless condition in colonial times."

– from the adapted article below



Official program—Woman suffrage procession, Washington, DC, March 3, 1913. Cover of program for the National American Women's Suffrage Association procession, showing "Woman," in elaborate attire, with cape, blowing a long horn, from which is draped a "VOTES FOR WOMEN" banner, on decorated horse, with the US Capitol in background

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article: *The National Struggle For Women's Suffrage, Part Two*. (Note: Part One of this article was in Unit 1.)
- Write biography notebook pages on **two of the women discussed in this lesson**. Research their lives and their contributions to both national politics and general social reform, and specifically their contribution to the women's suffrage movement.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Vocabulary

enfranchisement
pertinent
vicissitude

Key People, Places, and Events

George W. Julian
Elizabeth Cady Stanton
Susan B. Anthony

Frances Willard
National Federation of Women's Clubs

Woodrow Wilson
Nineteenth Amendment

Discussion Questions

1. Outline the history of the Nineteenth Amendment.
2. Describe the limited rights held by women in colonial America.
3. Why did the suffragists shift from a national to a state focus?
4. Summarize the history of the different types of suffrage in the United States.

Adapted for High School from the book:
History of the United States
by Charles A. Beard and Mary R. Beard

The National Struggle for Women's Suffrage, Part Two

Women in Public Affairs

Social legislation enacted in response to the spirit of reform vitally affected women in the home and in industry and was promoted by their organizations. Where they did not lead, they were affiliated with movements that called for social improvement. No cause escaped their attention; no year passed without widening the range of their interests. They served on committees that inquired into the problems of the day; they appeared before legislative assemblies to advocate remedies for the evils they discovered.

By 1912 they were a force to be reckoned with in national politics. In nine states complete and equal suffrage had been established, and a widespread campaign for a national suffrage amendment was in full swing. On every hand lay evidence that their sphere had been broadened to include public affairs. This was the culmination of forces that had long been operating.

A New Emphasis in History

A movement so deeply affecting important interests could not fail to find a place in time in the written record of human progress. History often began as a chronicle of kings, queens, knights, and ladies, written partly to amuse and partly to instruct the classes that appeared within its pages. With the growth of commerce, parliaments, and international relations, politics and diplomacy were added to such chronicles of royal and princely doings.

After the rise of democracy, industry, and organized labor, the transactions of everyday life were deemed worthy of a place in the pages of history. In each case history was rewritten and the past rediscovered in the light of the new age. So it was with the rise and growth of women's political power. The history of their labor, education, status in society, and influence on the course of events will be explored and given its place in the general record.

It will be a history of change. The position which women enjoy in America today is the result of a slow development from an almost rightless condition in colonial times. The founders of America brought with them the English common law. Under that law, a married woman's personal property—jewels, money, furniture, and the like—became her

husband's property; the management of her lands passed into his control. Even the wages she earned, if she worked for someone else, belonged to him.



Headquarters of the National Association
Opposed to Woman Suffrage

Custom, if not law, prescribed that women should not take part in town meetings or enter into public discussions of religious questions. Indeed, it was a far cry from the banishment of Anne Hutchinson from Massachusetts in 1637, for daring to dispute with the church fathers, to the political conventions of 1920 in which women sat as delegates, made nominating speeches, and served on committees. In the contrast between these two scenes may be measured the change in the privileges of women since the landing of the Pilgrims.

The account of this progress is a narrative of individual effort on the part of women, of organizations among them, and of generous aid from sympathetic men in the long agitation for the removal of civil and political disabilities. It is in part also a narrative of irresistible economic change which drew women into industry, gave women wages and incomes, and along with those advancements, economic independence.

The Nineteenth Amendment

At the close of World War I, women's plans and activities were still shaped by events beyond their control. The emancipation of the slaves and their **enfranchisement** had made prominent the question of a national suffrage for the first time in American history. Friends of the African American insisted that his civil liberties would not be safe

unless he was granted the right to vote. The woman suffragists had very **pertinently** asked whether the same principle should not apply to women. The answer they received was negative. The Fourteenth Amendment to the federal Constitution, adopted in 1868, put women aside by limiting the scope of its application, as far as suffrage was concerned, to the male sex. In making male suffrage national, however, it nationalized the issue.

This was the signal for the advocates of women's suffrage. In March 1869, their proposed amendment was introduced in Congress by **George W. Julian** of Indiana. It provided that no citizen should be deprived of the vote on account of sex, following the language of the Fifteenth Amendment, which forbade disfranchisement on account of race, ratified in 1870. Support for the amendment, coming from many directions, led the suffragists to believe that their case was hopeful. In their platform of 1872, for example, the Republicans praised the women for their loyal devotion to freedom, welcomed them to spheres of wider usefulness, and declared that the demand of any class of citizens for additional rights deserved "respectful consideration."

Experience soon demonstrated, however, that praise was not as valuable as the ballot. Indeed, the suffragists had already realized that a tedious contest lay before them. They had revived in 1866 their regular national convention. They gave the name of *The Revolution* to their newspaper, edited by **Elizabeth Cady Stanton** and **Susan B. Anthony**. They formed a national suffrage association and organized annual pilgrimages to Congress to present their claims. Such activities bore some results. Many eminent Congress members were converted to their cause and presented it ably to their colleagues of both chambers. Still the subject was ridiculed by the newspapers and looked upon as freakish by the masses.

The State Campaigns

Discouraged by the outcome of the national campaign, suffragists turned to the voters of the individual states and sought the ballot at their hands. Gains by this process were painfully slow. Wyoming, it is true, while still a territory, granted suffrage to women in 1869 and maintained it on becoming a state twenty years later, despite strong protests in Congress. In 1893 Colorado established complete political equality. In Utah, the third suffrage state, the cause suffered many **vicissitudes**. Women were enfranchised by the territorial legislature, and they were deprived of the ballot by Congress in 1887.

Finally in 1896, on the admission of Utah to the Union, they recovered their former rights. During the same year, 1896, Idaho conferred equal suffrage upon the women. This was the last suffrage victory for more than a decade.



Susan B. Anthony, public relations portrait used in *The History of Woman Suffrage*, by Anthony and Elizabeth Cady Stanton, published in 1881



Elizabeth Cady Stanton, engraving by Henry Bryan Hall, Jr.

The Suffrage Cause in Congress

In the midst of the meager gains among the states, there were occasional flurries of hope for immediate action on a federal amendment. Between 1878 and 1896, the Senate committee reported the suffrage resolution by a favorable majority on five different occasions. During the same period, however, there were nine unfavorable reports and only once did the subject reach the point of a general debate. At no time could anything like the required two-thirds vote be obtained.

The Changing Status of Women

While the suffrage movement was lagging, the activities of women in other directions were steadily multiplying. College after college—Vassar, Bryn Mawr, Smith, and Wellesley, to mention a few—was founded to give women the advantages of higher education. Other institutions, especially the state universities of the West, opened their doors to women, and women were received into the professions of law and medicine. By the rapid growth of public high schools in which girls enjoyed the same rights as boys, education was extended still

more widely. The number of women teachers increased by leaps and bounds.

Meanwhile women were entering nearly every branch of industry and business. How many of them worked at gainful occupations before 1870 we do not know; but from that year forward we have the records of the census. Between 1870 and 1900 the proportion of women in the professions rose from less than two percent to more than ten percent; in trade and transportation from 24.8 percent to 43.2 percent; and in manufacturing from 13 to 19 percent.

In 1910, there were over 8,000,000 women gainfully employed, compared with 30,000,000 men. When, during World War I, the government established the principle of equal pay for equal work and gave official recognition to the value of their services in industry, it was discovered how far women had traveled along the road forecast by the leaders of 1848.

The Club Movement Among Women

All over the country women's societies and clubs were started to advance various reforms or merely to study literature, art, and science. In time these women's organizations of all kinds were federated into city, state, and national associations and drawn into the consideration of public questions. Under the leadership of **Frances Willard**, they made temperance reform a vital issue. They took an interest in legislation pertaining to prisons, pure food, public health, and municipal government, among other things. At their sessions and conferences local, state, and national issues were discussed until finally, it seems, everything led to the quest of the vote.

By solemn resolution in 1914 the **National Federation of Women's Clubs**, representing nearly two million club women, formally endorsed women's suffrage. In the same year the National Education Association, speaking for the public school teachers of the land, added its seal of approval.

State and National Action

The suffrage movement was in full swing once again in the states. Washington in 1910, California in 1911, Oregon, Kansas, and Arizona in 1912, Nevada and Montana in 1914 by popular vote **enfranchised** their women. Illinois in 1913 conferred upon them the right to vote for President of the United States. The time had arrived for a new movement. A number of younger suffragists sought to use the votes of

women in the equal suffrage states to compel one or both of the national political parties to endorse and carry through Congress the federal suffrage amendment. Pressure then came upon Congress from every direction: from the suffragists who made a straight appeal on the grounds of justice; and from the suffragists who besought the women of the West to vote against presidential candidates who would not approve the federal amendment. In 1916, for the first time, a leading presidential candidate, Charles E. Hughes, speaking for the Republicans, endorsed the federal amendment and a distinguished ex-president, Theodore Roosevelt, exerted a powerful influence to keep it an issue in the campaign.

National Enfranchisement

After that, events moved rapidly. The great state of New York adopted equal suffrage in 1917. Oklahoma, South Dakota, and Michigan swung into line the following year; several other states, by legislative action, gave women the right to vote for president.

In the meantime, the suffrage battle in Washington grew intense. Appeals and petitions poured in upon Congress and the President. Militant suffragists held daily demonstrations in Washington. On September 30, 1918, President **Woodrow Wilson**, who two years before had opposed federal action and endorsed suffrage by state adoption only, went before Congress and urged the passage of the suffrage amendment to the Constitution. In June 1919, the requisite two-thirds vote was secured, and the resolution was carried and transmitted to the states for ratification. On August 28, 1920, the thirty-sixth state, Tennessee, approved it, making three-fourths of the states as required by the Constitution. Thus, the **Nineteenth Amendment** was ratified, and women's suffrage became the law of the land. A new political democracy had been created. The age of agitation was closed, and the epoch of responsible citizenship opened.



Woman suffrage headquarters in Cleveland

The Artios Home Companion Series

Unit 16: The Decade That Roared

Teacher Overview

DURING WORLD WAR I, major technological and industrial advances were made with astonishing swiftness, and these prepared the way for significant cultural shifts as well. The automobile was first and foremost among these products. The production method used by Henry Ford made these “horseless carriages” affordable to the American masses. Widespread use of the automobile ushered in changes in work patterns and leisure plans. A host of support industries were launched. The bleak outlook and large sacrifices of the wartime era became a part of the past, and young Americans were looking to cut loose and have a good time.

During this era, the Puritan ideal of the godly city upon a hill seemed to slip away in the pursuit of materialism and self-gratification throughout the Western world. Despite the Prohibition movement’s attempt to end alcohol usage, the subculture of the “speakeasy” kept the firewater flowing, and organized crime flourished as gangland violence related to bootlegged liquor plagued America’s cities. Fierce contentions also divided society over political and legal issues.

By the end of the decade, however, America seemed to be on the brink of abundant prosperity. The Industrial Revolution was now complete. The United States had proven itself a global power in building a new kind of nation governed by the people and by intervening in the First World War yet hadn’t suffered the physical destruction that plagued the European continent. The standard of living was rising faster than anywhere in the world. Indeed, when Herbert Hoover took office, he predicted that America would soon see the end of poverty.

No one predicted the calamity that was so soon to follow.



Caricature of a “ward heeler” politician haranguing voters by radio, from the cover of a 1922 American radio magazine. In 1922 radio was a revolutionary new technology. AM radio transmission only became widespread with the availability of amplifying vacuum tubes after WW I, and broadcasting had suddenly sprung up two year earlier, in 1920.

Suggested Assignments

In this unit, students will:

- Complete five lessons in which they will learn about the **1920s**, **cultural changes**, **Prohibition**, and **conflicts between old and new values**, journaling and answering discussion questions as they read.
- Do additional research on a **selected topic**.
- Make a **chart**.
- Write a brief summary of a **literary work**.
- Write a five-paragraph **essay**.
- Define vocabulary words.
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

God honors integrity and despises corruption.

A good name is to be chosen rather than great riches, and favor is better than silver or gold. The rich and the poor meet together; the Lord is the Maker of them all. The prudent sees danger and hides himself, but the simple go on and suffer for it. The reward for humility and fear of the Lord is riches and honor and life. Thorns and snares are in the way of the crooked; whoever guards his soul will keep far from them.

– Proverbs 22:1-5

God's people should seek to cultivate the fruit of God's Spirit, not living to gratify fleshly desires but to glorify God.

But the fruit of the Spirit is love, joy, peace, patience, kindness, goodness, faithfulness, gentleness, self-control; against such things there is no law. And those who belong to Christ Jesus have crucified the flesh with its passions and desires.

– Galatians 5:22-24

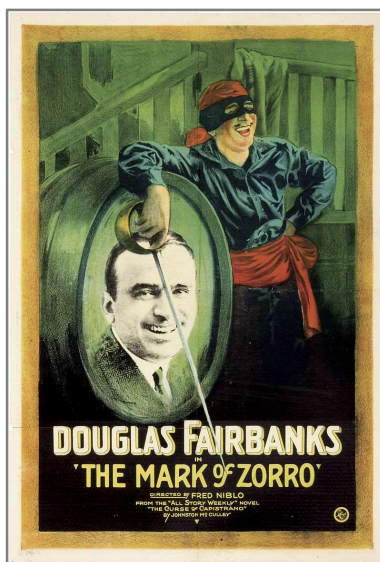
Children and young people should be teachable and open to instruction.

A wise son hears his father's instruction, but a scoffer does not listen to rebuke.

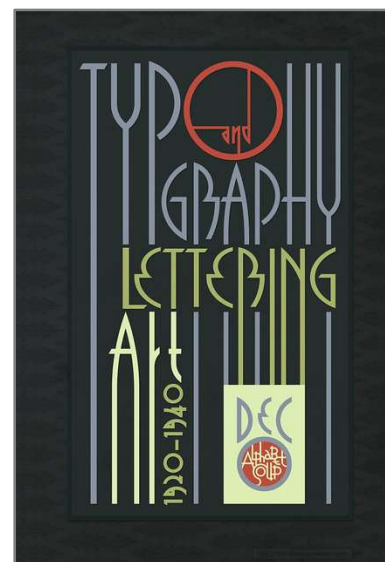
– Proverbs 13:1



Roaring Twenties, by Sweet Carolina Photography, licensed under CC BY 2.0



Movie poster for 1920 film *The Mark of Zorro*



Alphabet Soup "Grafica" Art Deco lettering, by arnoKath. CC BY-NC-SA 2.0

Lesson One

History Overview and Assignments The Roaring Twenties

"The Roaring Twenties was a fruitful period for the arts, music, and writing. A new art style became popular among designers and architects, fashion for women went in bold new directions displaying their desire for freedom of expression, and jazz music became all the rage. In literature, two popular movements or groups of writers arose: The Lost Generation and the Harlem Renaissance."

– from the adapted article below



Nearly a thousand people assembled at Roosevelt Field to see Charles Lindbergh off on his historic flight. Underwood and Underwood. Image Number: SI-77-2701 Credit: National Air and Space Museum Archives, Smithsonian Institution

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the combined article: *The Roaring Twenties, Part One* and *Cultural Change in the Interwar Period*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Do additional research on **one of the following topics** and be prepared to share what you learned:
 - The Harlem Renaissance
 - Art Deco
 - The assembly line and its effects on business
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Vocabulary

diffusion
 expatriate
 coeducation
 mass production

Key People, Places, and Events

Roaring Twenties	Fats Waller	Edvard Munch	Federal Radio Commission
William Harding	Jelly Roll Morton	Dada	Rudolph Valentino
Calvin Coolidge	Apollo Theater	Surrealism	Douglas Fairbanks
Herbert Hoover	Cotton Club	André Breton	John Barrymore
Harlem Renaissance	Marcus Garvey	Sigmund Freud	Greta Garbo
Langston Hughes	Art Deco	Golden Age of Radio	Henry Ford
Jazz Age	Cubism	National Broadcasting	Charles Lindbergh
Duke Ellington	Radio City Music Hall	Company	
Cab Calloway	Expressionism	Columbia Broadcasting	
Ella Fitzgerald	Vincent van Gogh	System	

Discussion Questions

1. What change in America's labor force led to the tremendous growth of industry and outpouring of cultural creativity that marked the Roaring Twenties era?
2. What economic policy was shared by Warren Harding, Calvin Coolidge, and Herbert Hoover?
3. What was the Harlem Renaissance?
4. What caused the divide between Marcus Garvey and other African American activists?

5. How did Henry Ford increase worker productivity in his factories and lower automobile prices?
6. What characteristics or philosophies mark the following styles of art and architecture?
 - a. Art Deco
 - b. Expressionism
 - c. Dadaism
 - d. Surrealism
7. For what did Charles Lindbergh become famous?

Adapted for High School from:
Boundless US History
source: courses.lumenlearning.com
The Roaring Twenties, Part One
and
Cultural Change in the Interwar Period
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The Roaring Twenties

The “**Roaring Twenties**” era was memorable for huge growth in areas from artistic expression and popular entertainment to industry and even crime.

The 1920s saw an explosion of industrial growth in the United States as World War I veterans returned to the labor force.

Government and big business became more closely entwined during the postwar era under the successive Republican administrations of three presidents: Harding, Coolidge, and Hoover.

Facing high unemployment and inflation, President Warren Harding signed tariff bills to reduce the national debt and taxes, protect the farming industry, and limit immigration.

The 1920s saw two major literary movements: the Harlem Renaissance, an African American cultural awakening based in New York’s Harlem district, and the “Lost Generation,” a group of US expatriates who mostly settled in Paris.

Radio, jazz music, and Hollywood films flourished as the popular entertainment of the era, while Prohibition and *speakeasies*, illegal nightclubs where alcohol was sold, helped fuel a criminal outbreak.

Politics and Economics

In the period following World War I, the United States experienced the consecutive Republican administrations of three presidents: **Warren Harding, Calvin Coolidge, and Herbert Hoover**. All three took the conservative position of forging a close relationship between government and big business. When Harding took office in 1921, the national economy was in the depths of a recession, with an unemployment rate of 20 percent and runaway inflation. He subsequently signed the

Emergency Tariff of 1921 and the Fordney-McCumber Tariff of 1922 to ease the economic suffering of domestic producers such as farmers. One of the main initiatives of both the Harding and Coolidge administrations was rolling back income taxes on the wealthy, which had been raised during World War I. It was believed that a heavy tax burden on the rich would slow the economy and reduce tax revenues.

The improvements resulting from an improved economy included the large-scale **diffusion** and use of automobiles, telephones, motion pictures, and electricity; unprecedented industrial growth; accelerated consumer demand and aspirations; and significant changes in lifestyle and culture. The media moved away from the hardships of war and focused on celebrities, especially sports heroes and movie stars, as cities rooted for their home teams and filled the new palatial movie theaters and gigantic stadiums. In most major countries, women had the opportunity to vote for the first time. Urbanization also reached a climax in the 1920s, with more Americans living in cities of 2,500 or more people than in small towns or rural areas than at any previous time in the country’s history.

Arts and Literature

The Roaring Twenties was a fruitful period for the arts, music, and writing. A new art style became popular among designers and architects, fashion for women went in bold new directions displaying their desire for freedom of expression, and jazz music became all the rage.

African American literary and artistic culture developed rapidly during the 1920s under the banner of the “**Harlem Renaissance**,” named for the historically African American Harlem section of New

York City. This cultural awakening was represented by notable writers including **Langston Hughes**, Zora Neale Hurston, Arna Bontemps, and Virginia Houston. Harlem also played a key role in the development of dance styles and the popularity of dance clubs.



Duke Ellington led a renowned jazz orchestra that frequently played the Cotton Club during the Harlem Renaissance of the 1920s. CC BY 2.0

The Jazz Age

If freedom was the mindset of the Roaring Twenties, then jazz was the soundtrack. Following the war, many jazz musicians came during the Great Migration from New Orleans to major northern cities such as Chicago and New York, leading to the **Jazz Age**, with a wider dispersal of jazz as different styles developed in different cities. Because of its popularity in live performances and its advancement due to the emergence of more advanced recording devices, jazz became very popular in a short amount of time, with stars including **Duke Ellington**, **Cab Calloway**, **Ella Fitzgerald**, and Chick Webb. Jazz and other energetic art forms also helped spur the expansion of mass market entertainment such as radio and film.

A new way of playing the piano, called the “Harlem Stride Style,” emerged during the Harlem Renaissance and helped blur the lines between poor and socially elite African Americans. The traditional jazz band was composed primarily of brass instruments and considered a symbol of the South, but the piano was considered an instrument of the wealthy. With this instrumental modification to the existing genre, wealthy African Americans now had more access to jazz music. Its popularity soon spread throughout the country. Innovation and liveliness were important characteristics of performers in the beginnings of jazz. Musicians at the time—including **Fats Waller**, Duke Ellington, **Jelly Roll Morton**, and Willie “The Lion” Smith—showed great talent and competitiveness and were considered to have laid the foundation for future musicians of their

genre. With several famous entertainment venues such as the **Apollo Theater** and the **Cotton Club**, Harlem attracted people from all walks of life, races, and classes.

Though the Harlem Renaissance was centered in the Harlem neighborhood of New York City, many French-speaking writers of African descent who lived in Paris were also influenced by the Renaissance. The zenith of the Harlem Renaissance was placed between 1924 and 1929.

The Back to Africa Movement

*Despite gaining some degree of cultural appreciation in their new locations, the African American community still faced a great deal of intolerance, partly due to job competition with numerous immigrant populations. A Jamaican-born political activist named **Marcus Garvey** galvanized New York’s urban African Americans into a strong political force, but he came to the opinion that their best chances for equality lie in returning to Africa. After gathering many thousands of followers, Garvey founded the Black Star Line steamship company and began transportation of passengers to the Republic of Liberia. His desire was for a unified Africa, which he wished to govern, and in which he hoped to enact laws to ensure racial purity. In this desire for separatism, Garvey agreed with the Ku Klux Klan. This caused a rift between him and other activists such as Du Bois, who sought integration rather than separatism. Garvey’s plans were disrupted by a conviction of mail fraud, and he was deported to Jamaica.*

Art Deco was the style of design and architecture that represented the era, emphasizing luxury and opulence, and marked by bold geometry and **Cubism**.



Pablo Picasso’s 1910 *Girl With a Mandolin (Fanny Tellier)* portrays the abstract geometry of Cubism.

Originating in Europe, Art Deco spread to North America in the mid-1920s and developed in a

different direction than that of Europe. Expressionism, and later Surrealism, were the preferred styles in Europe during the 1920s. Art Deco, already globally popular, found favor among designers in America as the 1920s progressed, culminating with the opening of **Radio City Music Hall** in 1932.



The Chrysler Building, considered the quintessential Art Deco skyscraper, located on the East side of Manhattan, New York City. Tony Hisgett from Birmingham, UK: *Chrysler Building 1*, Uploaded by Magnus Manske. CC BY 2.0

Expressionism, Dada, and Surrealism

German **Expressionism** began before World War I and exerted a strong influence on artists who followed throughout the 1920s. Initially focused on poetry and painting, Expressionism typically presented the world from a solely subjective perspective, radically distorting it for an emotional effect that evokes moods or ideas rather than physical reality. Many artists, however, began to oppose Expressionist tendencies as the decade advanced.

The works of **Vincent van Gogh** and **Edvard Munch**'s famous 1893 painting, *The Scream*, are thought to have influenced Expressionists, who counted among their numbers painters such as Wassily Kandinsky, Erich Heckel, and Franz Marc, as well as dancer Mary Wigman.



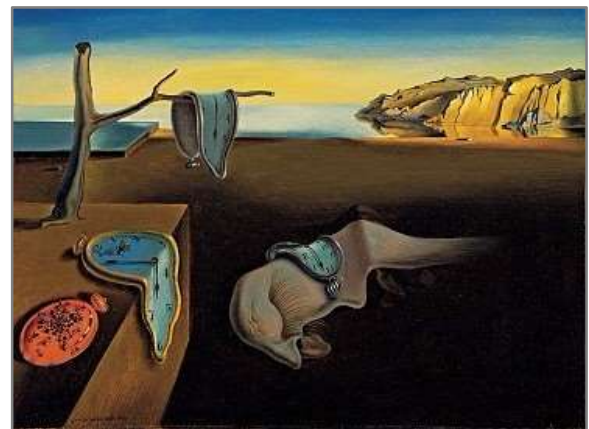
Edvard Munch's 1893 painting *The Scream* influenced twentieth-century Expressionist artists. CC BY 2.0

The **Dada** art movement began in Zurich, Switzerland, during World War I and became an international phenomenon, although it was initially an informal movement intended to protest the outbreak of World War I and the bourgeois, nationalist, and colonialist interests that Dadaists believed were root causes of the conflict. The movement opposed cultural and intellectual conformity in art and in society in general, usually displaying political affinities with the radical left. The reason and logic of the capitalist system had led to the war, Dadaists believed, and their rejection of that ideology led to an embrace of chaos and irrationality in their art. Machines, technology, and Cubist elements were features of their work.



The 1920 painting *Republican Automatons*, by George Grosz, was an example of Dadaist protest art. CC BY 2.0

Dada artists met and formed groups of like-minded peers in Paris, Berlin, Cologne, and New York City who engaged in activities such as public gatherings, demonstrations, and publication of art and literary journals. Notable Dadaists included Richard Huelsenbeck, who established the Berlin group, and George Grosz, who called his work a protest, "against this world of mutual destruction."



Salvador Dalí's 1931 *The Persistence of Memory* is one of the most well-known examples of Surrealism. CC BY 2.0

Arising from Dada activities during World War I and centered in Paris, **Surrealism** was a cultural movement that began in the early 1920s. Surrealism spread around the globe and impacted the visual arts, literature, theater, film, and music. The movement also informed political thought and practice, philosophy, and social theory.



Max Ernst's 1921 oil painting, *The Elephant Celebes*, was an example of European Surrealism, which profoundly influenced the artistic culture of the United States.

CC BY 2.0

Surrealist works featured elements of surprise, unexpected juxtapositions, and *non sequitur* (seemingly unrelated elements). Many Surrealist artists and writers regarded their work as the material expression of the movement's philosophy. The movement's leader, French anarchist and antifascist writer **André Breton**, emphasized that Surrealism was, above all, a revolutionary movement. In 1924 he published the Surrealist Manifesto, which called the movement "pure psychic automatism." Spanish painter Salvador Dali, best known for his 1931 work, *The Persistence of Memory*, was one of the most famous practitioners of Surrealism.

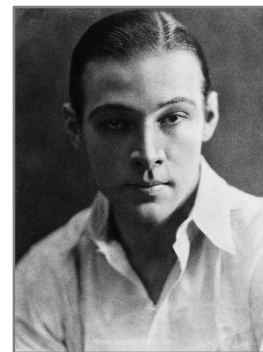
Young women's fashion of the 1920s was both a trend and a social statement, immortalized in movies and magazine covers, which broke off from the rigid Victorian way of life. Rebellious, middle-class women, labeled "flappers" by older generations, did away with the corset and donned slinky knee-length dresses, which exposed their legs and arms. This freedom also extended to their intellectual pursuits, as the era spawned progressive thinkers such as

Austrian psychoanalyst **Sigmund Freud** and the expansion of **coeducational** programs in which women took places at state colleges and universities alongside men.

Entertainment for the Masses

Radio became the first mass broadcasting medium during the 1920s. Radio sets were initially expensive, but the medium of entertainment and information transmission proved revolutionary. Radio advertising became the grandstand for mass marketing, and its economic importance led to the mass culture that has since dominated society.

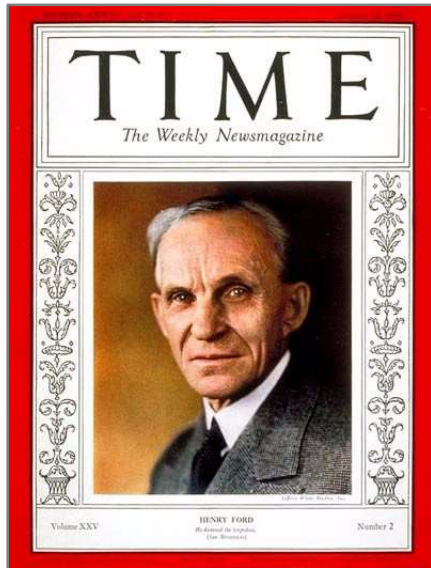
The "**Golden Age of Radio**" began after World War I with the first radio news program broadcast from Detroit on August 31, 1920, followed by the appearance of the first commercial station in Pittsburgh that same year. The first national radio networks came into being during this period, with the launch of the **National Broadcasting Company** (NBC) in 1926 and the **Columbia Broadcasting System** (CBS) in 1927. Unsurprisingly, 1927 was also the year that introduced a new era of regulation with the establishment of the **Federal Radio Commission**, ensuring the government played a role in the growth and oversight of the industry. Radio programming comprised a variety of formats and genres with shows similar to today's television, including soap operas, quiz and talent shows, comedies, and children's programs, as well as news bulletins and sports broadcasts.



Silent movie star Rudolph Valentino was one of Hollywood's first heartthrobs, starring in films such as *The Sheik* before his untimely death at age 31 in 1926.

Hollywood also boomed during this period, producing a new form of entertainment that shut down the old vaudeville theaters: the silent film. Watching a movie was cheap and accessible, creating a profitable market that saw crowds surging into new downtown movie palaces and neighborhood

theaters. Even greater entertainment marvels emerged as the decade progressed, the most important being sound synchronized motion pictures, or “talkies,” which quickly replaced silent films between 1927 and 1929. Actors and actresses—including **Rudolph Valentino**, **Douglas Fairbanks**, **John Barrymore**, **Greta Garbo**, and Clara Bow—became household names during the Roaring Twenties.



Automobile magnate Henry Ford on the cover of *TIME*, January 1935

Economics

The 1920s can be viewed as a period of great industry in America. The production of automobiles, petroleum, steel, and chemicals skyrocketed during this period. This was largely due to the adoption by industry of the technique of **mass production**, the system under which identical products were churned out quickly and inexpensively using assembly lines. The changeover to mass production drove down prices for objects that were previously made in much more individual, time-consuming methods and subsequently enabled an increase in new, affordable technology. A middle class of Americans emerged in the postwar period with surplus money and a desire to spend more, spurring the demand for consumer goods, especially the car.

Throughout the 1920s, the automobile industry became one of chief importance as car manufacturing in the United States experienced extraordinary growth. Before the war, cars were a luxury, but in the 1920s, mass-produced vehicles became common throughout the country. Using the manufacturing assembly-line system, in which

individual parts or sets of pieces are added to a product at stations on a conveyor belt or other moveable line, entrepreneurs such as automobile tycoon **Henry Ford** were able to greatly increase productivity. This innovation significantly reduced the cost of automobiles and thereby increased consumer demand.

Charles Lindbergh rose to instant fame in 1927 with the first solo, nonstop transatlantic flight from Long Island, New York, to Paris, France. The global attention garnered by the achievement of 25-year-old “Lucky Lindy” spawned advances that led to commercial aviation in the next decade. In the late 1920s and early 1930s, Lindbergh used his fame to promote the development of both commercial aviation and Air Mail services in the United States and the Americas.



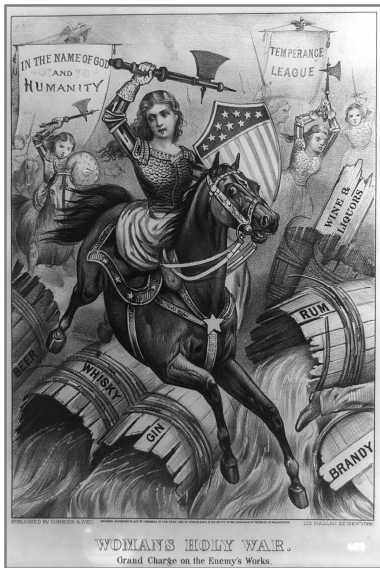
Charles Lindbergh with the *Spirit of St. Louis* before his Paris flight

Electrification progressed greatly in the 1920s as more of the United States was added to the electrical grid. Most industries switched from coal power to electricity, and new power plants were constructed. Telephone lines were strung across the continent, and indoor plumbing and modern sewer systems were installed for the first time in many regions. These infrastructure programs were mostly left to local governments, many of which went deeply into debt under the assumption that an investment in infrastructure would pay off in the future, a theory that caused major problems during the Great Depression.

Lesson Two

History Overview and Assignments The Fight Against “Demon Rum”

WHEN THE US RATIFIED the Eighteenth Amendment, the manufacture, sale, and transportation of alcoholic beverages was outlawed. Many progressive politicians rejoiced and proclaimed a safer America. It was predicted that worker productivity would increase, families would grow closer, and urban slums would disappear. Yet for all its promise, Prohibition was repealed fourteen years later, after being deemed a dismal failure.



An allegorical 1874 political cartoon print showing temperance campaigners (alcohol prohibition advocates) as virtuous, armored female warriors wielding axes to destroy barrels of beer, whisky, gin, rum, brandy, wine, and liquors, under the banners of “In the name of God and humanity” and “Temperance League”

Key People, Places, and Events

Prohibition
Eighteenth Amendment
Volstead Act
American Mafia
Al Capone
Bugs Moran

Vocabulary

loan sharking
flout
bootleg
cache
denature

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article: *The Roaring Twenties, Part Two*.
- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Make a chart with two columns. In one column, list the **advantages of Prohibition**. In the other column, list the **disadvantages of Prohibition**.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. To what did the word “Prohibition” refer during the early twentieth century?
2. Was the government successful in stopping the sale and consumption of alcohol? Why or why not?
3. Who profited the most from Prohibition?
4. In what ways did the 18th Amendment divide the nation?
5. Trace the relationship between Prohibition and organized crime.
6. What other approaches might have been more successful than Prohibition in addressing the societal problems America was experiencing due to alcohol overconsumption?

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The Roaring Twenties, Part Two
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Prohibition and Crime

Prohibition was a national ban on the sale, manufacture, and transportation of alcohol that lasted from 1920 to 1933. The **Eighteenth Amendment** to the US Constitution banning alcohol was implemented through the **Volstead Act**, which went into effect on January 17, 1920.

Speakeasies became popular and plentiful as the legally dry years progressed. The ban led to a groundswell of criminal activity, with powerful gangs controlling the sale and distribution of alcohol and a number of related activities including gambling and prostitution. Gangsters were involved in bribery, extortion, **loan sharking**, and money laundering. The illicit alcohol industry effectively transformed cities into battlegrounds fought over by various crime syndicates, most notably the **American Mafia**. Prohibition continued until its repeal in the Twenty-First Amendment to the Constitution in 1933.

Prohibition

Prohibition outlawed alcohol for 13 years, splitting the nation morally and politically while empowering organized crime. Prohibition sparked debate between those who argued the sale of alcohol to be both immoral and unhealthy, and those who saw the ban as an intrusion of rural Protestant ideals on mainstream, everyday life.

Enforcing Prohibition proved difficult due to the lack of coordination between federal and state law enforcement and the relative ease of crossing America's northern and southern borders undetected.

The institution of Prohibition led to the rise of criminal organizations behind the illegal import and sale of alcohol, most notably the American Mafia.

The popularity of jazz music grew rapidly during Prohibition as a result of the popularity of the music in speakeasies.

Understanding the unpopularity of Prohibition, as well as the opportunity for greater tax revenue, Democrats called for the alcohol ban to be overturned, resulting in its repeal in the Twenty-first Amendment in 1933.

The "Dries" who supported Prohibition

proclaimed it to be a victory for public morals and health, while "Wets" criticized the alcohol ban as an intrusion of mainly rural, Protestant ideals upon a central facet of urban, immigrant, and Catholic life, as well as a loss of large amounts of tax revenue. Effective enforcement of the ban proved to be difficult, however, and led to widespread **flouting** of the law, as well as a massive escalation of organized crime.

Volstead Act

When the Volstead Act went into effect, a total of 1,520 Prohibition agents from three separate federal agencies—the Coast Guard Office of Law Enforcement, the Treasury Department/Internal Revenue Service Bureau of Prohibition, and the Department of Justice Bureau of Prohibition—were tasked with enforcing the new law. This effort lacked centralized authority, however, and many attempts to impose Prohibition were inhibited by the lack of transparency between federal and state authorities. The matter of geography presented further complications in that valleys, mountains, lakes, and swamps, as well as the extensive seaways, ports, and massive borders running along Canada and Mexico, made it exceedingly difficult to stop **bootleggers** intent on avoiding detection.



Detroit police with confiscated brewery equipment: Enforcement of Prohibition was a major challenge throughout the 1920s due to a lack of coordination between law enforcement agencies and the difficulties of detecting and apprehending bootleggers.

While the commercial manufacture, sale, and transport of alcohol was illegal, Section 29 of the

Volstead Act allowed private citizens to make wine and cider from fruit, but not beer, in their homes. Up to 200 gallons per year could be produced, with some vineyards growing grapes for purported home use. In addition to this loophole, the wording of the act did not specifically prohibit the consumption of alcohol. In anticipation of the ban, many people stockpiled wines and liquors during the latter part of 1919 before alcohol sales became illegal in January 1920. As Prohibition continued, people began to perceive it as illustrative of class distinctions, since it unfairly favored social elites. Working-class people were enraged that their employers could dip into a **cache** of private stock while they were unable to afford similar indulgences.

Organized Crime

The rift between the Dries and the Wets over alcohol consumption and sales largely hinged on the long-running, historical debate over whether drinking was morally acceptable in light of the antisocial behavior that overindulgence could cause. Ironically, this dispute over ethics during the “Roaring Twenties” led to a sudden groundswell of criminal activity, with those who opposed legal alcohol sales unintentionally enabling the growth of vast criminal organizations that controlled the illegal sale and distribution of alcohol and a number of related activities including gambling and prostitution. Powerful gangs corrupted law enforcement agencies, leading to the blanket criminal activity of **racketeering**, which includes bribery, extortion, loan sharking, and money laundering. Illicit alcoholic beverage industries earned an average of \$3 billion per year in illegal income, none of which was taxed, and effectively transformed cities into battlegrounds between opposing bootlegging gangs.



Al Capone, June 1931: Alphonse “Al” Capone headed the largest criminal organization in the Chicago area during Prohibition. A colorful figure notorious for a multitude of crimes related to his illegal alcohol operation, Capone was eventually imprisoned for tax evasion in 1931.

Chicago, the largest city in Illinois and one of America’s true metropolises along with New York and Los Angeles, became a haven for Prohibition dodgers. Many of Chicago’s most notorious gangsters, including **Al Capone** and his archenemy, **Bugs Moran**, made millions of dollars through illegal alcohol sales. By the end of the decade, Capone controlled all 10,000 Chicago speakeasies, and ruled the bootlegging business from Canada to Florida. Numerous other crimes, including theft and murder, were directly linked to criminal activity in Chicago and other cities in violation of Prohibition.

To prevent bootleggers from using industrial ethyl alcohol to produce illegal beverages, the government ordered the poisoning of industrial alcohols. Bootleggers combated this by hiring chemists who successfully **renatured** the alcohol to make it drinkable. In response, the Treasury Department required manufacturers to add even more deadly poisons to industrial alcohols, including Sterno (or “canned heat”) and the particularly deadly methyl alcohol. As many as 10,000 people died from drinking denatured alcohol before Prohibition ended.

Jazz and Speakeasies

Prohibition had a large effect on music in the United States, specifically on jazz. Speakeasies grew in popularity during the Prohibition era, partially influencing the mass migration of jazz musicians from New Orleans to major northern cities such as Chicago and New York. This movement led to a wider dispersal of jazz, as different styles developed in different cities. Because of its popularity in speakeasies and its advancement due to the emergence of more advanced recording devices, jazz became very popular in a short amount of time.

Jazz was also at the forefront of the minimal integration efforts of the time, as it united mostly African American musicians with mostly white crowds. As the saloon began to die out, public drinking lost much of its masculine association, resulting in an increased social acceptance of women drinking in the semipublic environment of a speakeasy, also known as a “blind pig” or a “blind tiger.” This new norm established women as a notable new target demographic for alcohol marketers, who sought to expand their clientele.

Repeal of Prohibition

The Eighteenth Amendment had outlawed “intoxicating liquors for beverage purposes,” but it

did not set a limit on alcohol content, which the Volstead Act did by establishing a limit of 0.5% alcohol by volume. The beer that could be legally consumed was essentially a very weak mixture. On March 22, 1933, President Franklin D. Roosevelt signed an amendment to the Volstead Act known as the Cullen-Harrison Act, allowing the manufacture and sale of light wine and “3.2 beer,” referring to 3.2% alcohol content. Upon signing the amendment, Roosevelt made his famous remark: “I think this would be a good time for a beer.”

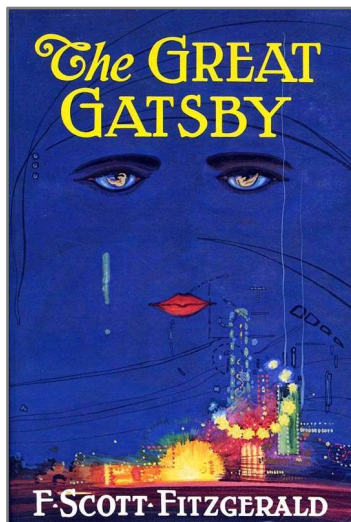
On December 5, 1933, ratification of the Twenty-first Amendment repealed the Eighteenth Amendment. As Prohibition ended, some of its supporters, including industrialist and philanthropist John D. Rockefeller, openly admitted its failure. In a positive epilogue, however, the overall consumption of alcohol dropped and remained below pre-Prohibition levels long after the Eighteenth Amendment ceased to be law.

Lesson Three

History Overview and Assignments The “Lost Generation”

“The spirit of the Roaring Twenties was marked by a general feeling of discontinuity associated with ‘modernity’ and a break with traditions. At the same time, everything imaginable seemed to be possible through modern technologies, especially with automobiles, movies, and radio programs spreading modernity throughout society.”

– from the adapted article below



Cover art for the 1925 novel *The Great Gatsby*, in which author F. Scott Fitzgerald captured the essence of the Jazz Age and the despair generated by its conflicting values in post-World War I America

Key People, Places, and Events

Lost Generation
Modernism
F. Scott Fitzgerald
The Great Gatsby
William Faulkner
Walt Whitman
Alan Seeger
John Steinbeck
Aldous Huxley
James Joyce
T.S. Eliot
Erich Maria Remarque

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article: *The Roaring Twenties, Part Three*.
- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Do some outside research and write a brief summary of **one of the literary works** discussed in today’s reading.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. How did the writers of the 1920s become known as the “Lost Generation”?
2. Name the authors of the following works:
 - a. *The Great Gatsby*
 - b. *The Sun Also Rises*
 - c. *Ulysses*
 - d. “The Waste Land”
 - e. *All Quiet on the Western Front*
3. What effects did World War I have on the Lost Generation writers?
4. What traits characterize American Modernism?

Adapted for High School from:

Boundless US History

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The Roaring Twenties, Part Three

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The Lost Generation

The “**Lost Generation**” was a group of writers and artists, including many expatriates, who helped define a larger movement after World War I called **Modernism**. The 1920s was a notable period of artistic creativity, especially in literature, with works by several distinguished authors appearing during this time.

The Lost Generation came of age during World War I, which deeply affected the group’s literary and artistic sensibilities. Members included distinguished artists such as F. Scott Fitzgerald, T.S. Eliot, John Dos Passos, Waldo Peirce, Alan Seeger, and Erich Maria Remarque. In France, the country in which many of these expatriates settled, the group was sometimes called the *Génération au Feu*, or the “Generation in Flames.”

Modernist Life and Literature

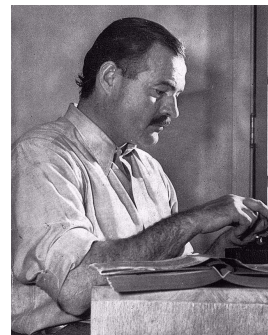
The spirit of the Roaring Twenties was marked by a general feeling of discontinuity associated with “modernity” and a break with traditions. At the same time, everything imaginable seemed to be possible through modern technologies, especially with automobiles, movies, and radio programs spreading modernity throughout society. Formal decorative frills were shed in favor of practicality in both daily life and architecture. At the same time, jazz and dancing rose in popularity, in opposition to the horrors of World War I; consequently, the period is also frequently referred to as the “Jazz Age.” **F. Scott Fitzgerald’s** novel *The Great Gatsby* is considered by many the best description of the Jazz Age in American literature.

The loss of identity and the need to “build a self”

are main characteristics in American Modernism; *The Great Gatsby* reflects this focus. Celebrated Modernists also include Ezra Pound, William Carlos Williams, and **William Faulkner**. While largely regarded as a romantic poet, **Walt Whitman** is also considered a pioneer of the Modernist era.

Lost Generation

The term “Lost Generation” first appeared in Ernest Hemingway’s novel, *The Sun Also Rises*, which documents the expatriate community in Europe after World War I. Hemingway attributed the term to his mentor and patron, fellow novelist Gertrude Stein.



Ernest Hemingway, 1939: American author Ernest Hemingway coined the term “Lost Generation” to describe those who came of age during, and shortly after, World War I.

In his book *A Moveable Feast*, published after Hemingway and Stein were both dead, Hemingway revealed that the phrase actually originated with the garage owner who serviced Stein’s car. When a young mechanic failed to repair the car to her satisfaction, the garage owner told Stein that while young men were easy to train, he considered those in their mid-

20s to 30s, the men who had been through World War I, to be a lost generation, or “*une génération perdue*.” Telling Hemingway the story, Stein added, “That is what you are. That’s what you all are . . . all of you young people who served in the war. You are a lost generation.”

Some of the names linked to the Lost Generation movement were not necessarily among Hemingway’s companions in Paris during the postwar period, but are included because their formative years occurred shortly before or during World War I. In addition to Hemingway and Fitzgerald, the movement of writers and artists also loosely includes John Dos Passos, Waldo Peirce, **Alan Seeger**, **John Steinbeck**, Sherwood Anderson, **Aldous Huxley**, Malcolm Crowley, Isadora Duncan, **James Joyce**, Henry Miller, and **T.S. Eliot**.

James Joyce was a friend of Hemingway’s during the years both lived in Paris. Joyce was an Irishman best known for *A Portrait of the Artist as a Young Man* and his milestone work published in 1922, *Ulysses*, which reflects the episodes in Homer’s *Odyssey*. T.S. Eliot was a British essayist best known for some of the most recognizable poems written in English including “The Waste Land” and “The Hollow Men.” He was awarded the 1948 Nobel Prize in Literature.



Thomas Stearns Eliot, 1934: T.S. Eliot was an important figure among the “Lost Generation” movement of writers.

World War Influence

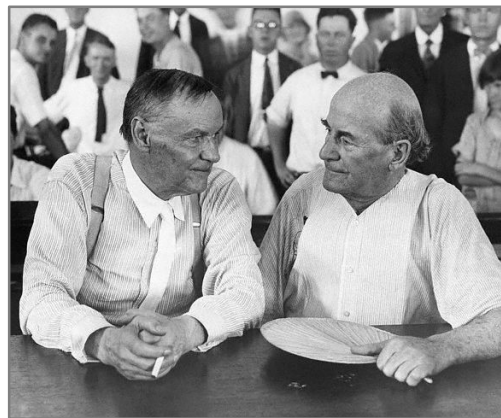
The Lost Generation was greatly influenced by World War I. American Modernist writers who offered an insight into the psychological wounds and spiritual scars of the war experience, a theme repeated in Hemingway’s work and in Fitzgerald’s portrayal of the lives and morality of post-World War I youth in his book *This Side of Paradise*.

In that same vein, but employing a perspective outside of the American viewpoint, the 1929 novel *All Quiet on the Western Front*, by **Erich Maria Remarque**, recounts the horrors of World War I and also the deep detachment from German civilian life felt by many men returning from the front. The 1930 film version of the book was nominated for four Academy Awards and won two.

Lesson Four

History Overview and Assignments The “Monkey Trial”

THE SCOPES TRIAL was a landmark American legal case in 1925, in which a high school science teacher, John Scopes, was accused of violating Tennessee’s Butler Act that made it unlawful to teach the theory of evolution in any state-funded school. The trial pitted Modernists, who supported the teaching of evolution, against Fundamentalists who interpret the Bible’s portrayal of Creation as a scientific description. William Jennings Bryan, three-time presidential candidate, argued for the prosecution, while famed defense attorney Clarence Darrow, supported by the American Civil Liberties Union, defended Scopes.



Legendary defense lawyer Clarence Darrow faces off against William Jennings Bryan in the Dayton, Tennessee trial of schoolteacher John Scopes. Bryan died in Dayton five days after the trial ended.

Suggested Reading and Assignments

- Read the article: *Resistance to Change, Part One*.
- Narrate about today's reading using the appropriate notebook page. Be sure to include key people, events, and dates within the narration.
- Instead of answering discussion questions, write a five-paragraph essay describing the events surrounding the **Scopes Trial**, using the information in today's article and additional research you do on your own.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

Scopes Trial
John Scopes
John W. Butler

Butler Act
American Civil Liberties Union
William Jennings Bryan

Clarence Darrow
Charles Darwin

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Resistance to Change, Part One

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The Scopes Trial of 1925 brought to national attention the debate over teaching evolution in public schools.

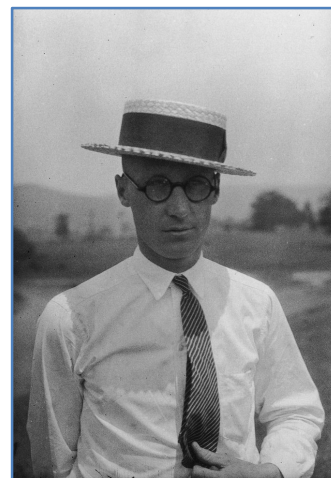
Formally known as *The State of Tennessee v. John Thomas Scopes*, the “Scopes Monkey Trial” of 1925 was a landmark American legal case in which teacher **John Scopes** was accused of violating Tennessee’s Butler Act by teaching evolution in a state-funded school. The trial initiated by the American Civil Liberties Union was mostly for show, but it had major implications for the issue of whether evolutionary science could be taught in public schools by pitting the Fundamentalist Christian belief of young-earth creationism against the theory of evolution.

The Butler Act

Tennessee State Representative **John W. Butler**, a farmer and head of the World Christian Fundamentals Association, lobbied for the passage of antievolution laws, and in 1925, the **Butler Act** passed the state legislature as “Tennessee Code Annotated Title 49 (Education) Section 1922.” The law prohibited public school teachers from denying the literal Biblical account of Creation, namely that God had created the world and everything in it in seven days, between six and ten thousand years ago, as a scientific description of Creation. The law also prevented the teaching of the evolution of man from what it referred to as “lower orders of animals,” rather than the literal Biblical account of man appearing fully formed in the person of Adam, closely followed by Eve.

Tennessee Governor Austin Peay signed the law to solidify his support among rural, Christian conservatives in the state legislature, but did not believe the law would ever need to be enforced or would interfere with Tennessee public school education.

The **American Civil Liberties Union** (ACLU), however, staged a scenario that challenged the governor’s assumptions. The nonprofit legal organization financed a case to test the legality of the Butler Act in a court proceeding that would deliberately attract publicity to the issue. In order to have a defendant, the ACLU recruited Scopes, 25, to purposefully incriminate himself by admitting that he had used a textbook chapter that teaches the theory of evolution while substituting for another teacher in Dayton, Tennessee.



Teacher John T. Scopes, the defendant in the famous Scopes trial of 1925

The “Monkey Trial”

The trial drew intense publicity and was followed by the press and on the radio throughout America. Reporters flocked to the small town of Dayton to cover the famed attorneys representing each side. **William Jennings Bryan**, three-time presidential candidate for the Democrats, argued for the prosecution’s case supporting creationism, the idea that God, in a manner beyond our understanding, made the world and everything in it over the course of seven days. Prominent attorney **Clarence Darrow** spoke in defense of Scopes by presenting the Modernist argument in favor of the theory of evolution. Based on research in **Charles Darwin’s** 1859 book, *On the Origin of Species*, the theory contends that man developed over millions of years from other biological organisms, including apes (hence the nickname “Scopes Monkey Trial.”)

In the end, Scopes was found guilty and fined \$100. Both sides claimed victory after the trial, but the Butler Act was upheld, and the anti-evolution movement continued.

The Legacy of the Trial

Though often upheld as a win for the Fundamentalists, the Scopes trial victory was not complete. The ACLU had taken on the trial as a

cause, but in the wake of Scopes’ conviction, the organization was unable to find additional volunteers to oppose the Butler Act. By 1932, the ACLU gave up its legal strategy, and the antievolutionary legislation was not challenged again until 1965. Still, the teaching of evolution expanded, while efforts to use state laws to reverse the trend failed in the court of public opinion.



The case also lived on in popular culture when it was dramatized in the play and subsequent movie, *Inherit the Wind*. The 1960 film version—starring Spencer Tracy, Frederic March, and Gene Kelly—was nominated for four Academy Awards and two Golden Globes.

The battle that played out before the nation continues to rage today. Clearly, the 1920s did not see the end to these conflicts or the answers to their major questions.

Lesson Five

History Overview and Assignments Harding, Coolidge, and Hoover

“The new era of the 1920s was marked by unregulated capitalism, with the Harding and Coolidge administrations marking a return to the hands-off style of nineteenth-century presidents, in contrast to the activism and regulation of Theodore Roosevelt and Woodrow Wilson. Yet the dangerous practices of credit extensions, stock speculation, and excessive government spending under Hoover brought the good times to a calamitous end.”

– from the adapted article below

Suggested Reading and Assignments

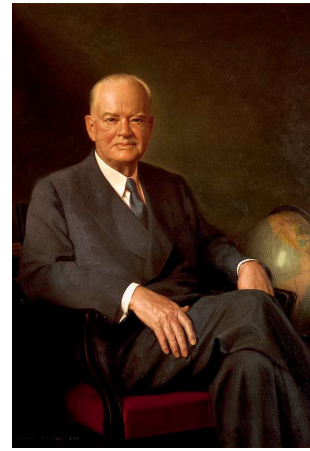
- Review the discussion questions and vocabulary, then read the combined article: *The New Era and Resistance to Change, Part Two*.
- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.



President Warren Harding



President Calvin Coolidge



President Herbert Hoover

Key People, Places, and Events

Warren G. Harding
Federal Highway Act of 1921

Teapot Dome Scandal
Great Railroad Strike

Calvin Coolidge
Herbert Hoover

Federal Farm Board

Vocabulary

injunction

graft

Discussion Questions

- Describe the Teapot Dome Scandal.
- How was the Great Railroad Strike settled?
- What was historically significant about the 1924 presidential election?
- What did Calvin Coolidge's administration emphasize?
- What did Herbert Hoover believe regarding individualism and business enterprise?
- In what way did the presidents of the 1920s differ from Theodore Roosevelt and Woodrow Wilson regarding economic regulation?
- What practices of Herbert Hoover precipitated economically disastrous consequences?
- Trace the means by which the end of World War I led to stagnant market conditions and living standards.
- What was controversial about the McNary-Haugen Farm Relief Act?
- Describe Herbert Hoover's plan to modernize farming.

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Boundless US History

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The New Era

and

Resistance to Change, Part Two

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Warren G. Harding's Administration *Republican: 1921–1923*

In the US presidential election of 1920, the Republican Party ran **Warren G. Harding** on a promise of a “return to normalcy” after the years of war, ethnic hatreds, race riots, and exhausting reforms. Harding used new advertising techniques to lead the GOP to a landslide victory, carrying the major cities as many traditionally Democratic voters such as the Irish, Catholics, and Germans—feeling

betrayed by Woodrow Wilson's administration—deserted to the Republicans.

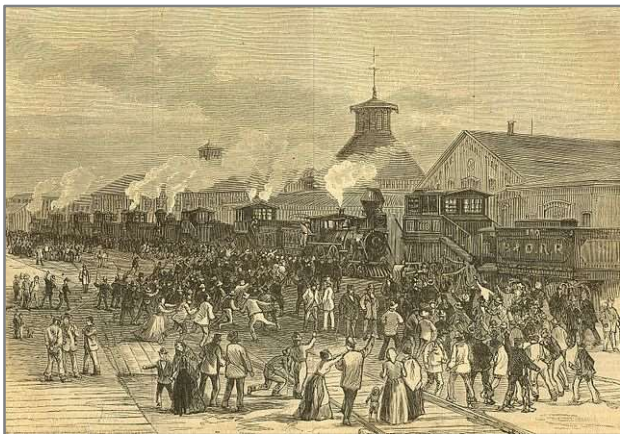
Harding cut taxes and signed the Revenue Act of 1921, which gave wealthy Americans large tax deductions, while the Budget and Accounting Act of 1921 established the Bureau of the Budget and the General Accounting Office, setting up a formal budgeting process and assuring oversight of expenditures.

Outside of economic affairs, to accommodate the

advent of the automobile age, Harding signed the **Federal Highway Act of 1921** to expand the nation's highway system. Harding was also an advocate of civil rights for African Americans, encouraging the establishment of an international commission to improve race relations and supporting a federal anti-lynching measure, the Dyer Bill.

Unfortunately, the **Teapot Dome Scandal** tainted the reputation of the Harding administration. In 1922, it was revealed that Secretary of the Interior Albert Bacon Fall had leased US Navy petroleum reserves at the Teapot Dome oil field in Wyoming and two other properties in California to private oil companies at favorable rates without competitive bidding. The leases themselves were not illegal, but Fall had accepted bribes from Mammoth Oil and Pan American Petroleum and Transport Company to secure the deals; he was later convicted and became the first member of a presidential cabinet to be sentenced to prison.

Albert Fall was a member of the so-called "Ohio Gang" that also included Attorney General Harry M. Daugherty and US Navy Secretary Edwin Denby, among others. In addition to involvement in Teapot Dome, the Ohio Gang was believed to have been behind recurring acts of cronyism and corruption, including storing bootleg whisky inside the White House.



Blockade of Engines at Martinsburg, West Virginia, an engraving on the front cover of Harper's Weekly, Journal of Civilization, Vol XXL, No. 1076, New York, Saturday, August 11, 1877

Also in 1922, the nationwide strike by railway shopmen that became known as the **Great Railroad Strike** began under the guidance of labor organizations. Clashes with strikebreakers, shootings by armed company guards, and sabotage by strikers led to the deaths of at least 10 people.

Harding proposed a settlement that was rejected by the rail companies, while Attorney General Harry M. Daugherty pressed for national action against the strike. After a sweeping and highly controversial **injunction** by a federal judge against striking, picketing, and other union activities, the railroad strike eventually faded away through local arrangements between workers and their employers.

In another national controversy, Harding clashed with veterans over the issue of providing bonus payments for those who served in World War I, instead favoring a future pension system. Harding vetoed a version of an adjusted compensation act in September 1922, diminishing his overall popularity and costing him support among Republicans who saw his attempts at fiscal responsibility as endangering the party's prospects in future elections.

Graft and corruption charges permeated Harding's Department of Justice, run by Daugherty, who was involved with an illegal liquor scheme in which bootleggers got their hands on tens of thousands of cases of whiskey through bribery and kickbacks to government officials. In another example of official misconduct, Charles Forbes, head of the Veterans Bureau, was convicted of fraud and bribery in connection with government contracts.

Harding himself was involved in scandals with women. Beginning when he was a newspaper publisher in Marion, Ohio, Harding conducted a long, extramarital affair with Carrie Fulton Phillips, a local merchant's wife, which continued into his time as a US senator, ending only when Phillips blackmailed the senator over the relationship. Harding had another affair with a woman named Nan Britton, the daughter of a friend of Harding, while he was still a senator, and which continued throughout his presidency. The relationship did not come to light until 1928, five years after Harding's death, when Britton published a memoir that included torrid details of the affair including trysts inside the White House. She also claimed they had a child together the year before his election as president, but it was not until 2015 that DNA testing confirmed Britton's daughter, Elizabeth Ann Britton Harding Blaesing, was indeed fathered by Harding.

Suffering exhaustion and illness believed to be brought on by the stress of the controversies, Harding died of an apparent heart attack in August 1923 during a cruise to Alaska. Vice President **Calvin Coolidge**—a dour, puritanical, and intensely honest man—succeeded Harding and in

many ways, could not have been more different than his predecessor. Coolidge's White House stood in sharp contrast to that of Harding.

Calvin Coolidge's Administration *Republican: 1923–1929*

Proclaiming, "The business of America is business," Coolidge extolled entrepreneurship and emphasized technological efficiency and prosperity as the keys to social improvement, and the economy flourished. In the Coolidge economy, energy was a key factor, especially electricity and oil. As electrification reached a growing number of cities and towns, consumers demanded new products such as lightbulbs, refrigerators, and toasters. Factories installed electric motors and saw productivity surge. Oil booms in Texas, Oklahoma, and California enabled the United States to dominate world petroleum production, which became even more important in an age of automobiles and trucks.



President Coolidge signing appropriation bills for the Veterans Bureau on the South Lawn during the garden party for wounded veterans on June 5, 1924

Historic Results

The 1924 presidential election was the first in which all Native Americans were recognized as citizens and allowed to vote. The distribution of the vote was subsequently altered throughout the country and particularly in 18 states in the middle and far West. Coolidge and his running mate, Charles G. Dawes of Ohio, topped the polls in 35 states, leaving the electoral vote for Davis in only 12 states.

Coolidge won all five boroughs of New York City, primarily due to his popularity among Irish Catholics and other immigrant communities, which is still considered a nearly impossible feat for a Republican candidate in a historically Democratic stronghold. Coolidge's campaign slogan, "Keep Cool with Coolidge," not only was highly popular with the

nation, but an indicator of how easily he would win the presidency.

Herbert Hoover's Administration *Republican: 1929–1933*

When Coolidge declined to run for reelection in 1928, the Republican Party nominated engineer and Secretary of Commerce **Herbert Hoover**, who was elected by a wide margin.

The Republican Party of the 1920s was publicly identified with the thriving economy of the post-World War I period, and Herbert Hoover personified that success. A graduate of Stanford University in 1895 with a degree in geology, Hoover served as both a geologist and mining engineer while searching the Western Australian goldfields for Bewick, Moreing & Co., a London-based mining company.

After working in China for a time, Hoover set out on his own as an independent mining consultant. Eventually he had investments on every continent and offices in San Francisco, London, New York City, St. Petersburg, Paris, and Mandalay, Burma. By 1914, Hoover was extremely wealthy, with an estimated personal fortune of \$4 million. He was once quoted as saying, "If a man has not made a million dollars by the time he is forty, he is not worth much."

Hoover had served as head of the US Food Administration during World War I and then as the US Secretary of Commerce during the 1920s under presidents Warren Harding and Calvin Coolidge. He promoted partnerships between government and business under the rubric of "economic modernization."

He was a firm proponent of the Efficiency movement, which held that the government and economy were riddled with inefficiency and waste and could be improved by experts who could identify and solve the problems. He also believed in the importance of volunteerism and the role of individuals in both society and the economy. Hoover was the first of two presidents to redistribute his entire salary; John F. Kennedy donated all of his presidential paychecks to charity.

Hoover believed in the efficacy of individualism and business enterprise, with limited coordination by government, to cure all problems. He envisioned a future of unbounded plenty and the imminent end of poverty in America.

President Hoover advocated individualism and business enterprise, but his policies that created an economic boom enabled credit extensions and

speculation that resulted in the Stock Market Crash of 1929.

The economic bubble of the late 1920s under Hoover was reflected in the extension of credit to a dangerous degree, including in the stock market, which rose to record high levels. Government size was at a very low level while at the same time government spending increased, causing greater economic freedom and prosperity. Dangerously high credit levels combined with excessive speculation in the stock market led to the stock market crash of 1929. This threw the nation's economy into the Great Depression that hobbled the country in the 1930s.

The new era of the 1920s was marked by unregulated capitalism, with the Harding and Coolidge administrations marking a return to the hands-off style of nineteenth-century presidents, in contrast to the activism and regulation of Theodore Roosevelt and Woodrow Wilson. Yet the dangerous practices of credit extensions, stock speculation, and excessive government spending under Hoover brought the good times to a calamitous end.

CHANGES IN AGRICULTURE

Agriculture underwent a revolution in the 1920s as heavy equipment enabled rapid expansion but also hurt small farmers and caused a migration to urban areas.

During World War I, American farmers had made record profits. Agricultural competition from Europe and Russia had disappeared due to the damages of battle, and American agricultural goods were shipped around the world. The early 1920s saw a rapid expansion in the American agricultural economy, largely due to new technologies and mechanization. Yet as the decade progressed, the agricultural sector did not fare as well as other industries such as automobiles that were seeing a boom through mass production. The US government attempted to help with policies benefiting agriculture, but as foreign countries returned to producing their own food, American goods became overproduced and experienced a drop in prices. This downturn in the rural economy also had a social effect on the farm, as many young workers who had experienced the world beyond their hometowns during the war chose to move to larger towns and cities.

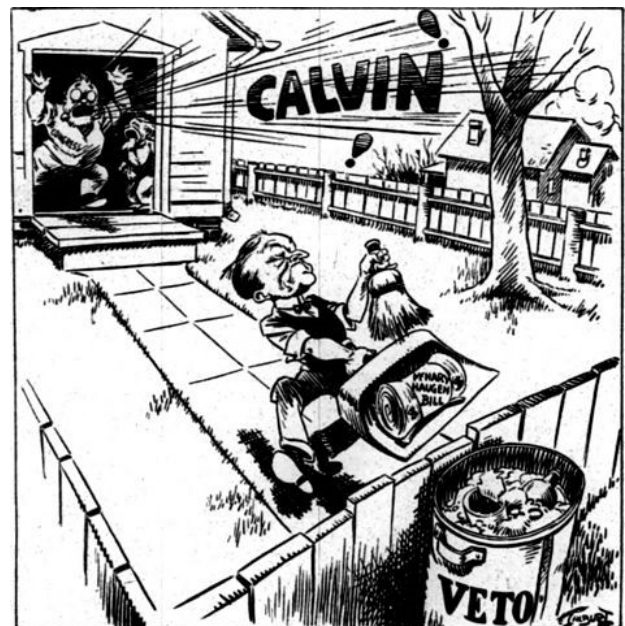
Agricultural Technology

Agriculture became increasingly mechanized in

the 1920s with widespread use of the tractor, combine harvester, and other heavy equipment. Information about superior techniques was disseminated through county agents employed by state agricultural colleges and funded by the federal government. The new technologies meant that the most efficient farms were larger in size and more business-oriented firms, hurting the profits of small, family farms that had long been the model in rural America. Despite this increase in farm size and capital intensity, however, the great majority of agricultural production continued to be undertaken by family-owned enterprises.

Financial Burdens

When the war ended, the global food supply increased rapidly as Europe's agricultural market rebounded. Overproduction led to plummeting prices, which led to stagnant market conditions and living standards for farmers in the 1920s. In the United States, hundreds of thousands of farmers had taken out mortgages and loans to buy neighboring properties and were suddenly unable to meet the financial burden. This caused the collapse of land prices after the wartime bubble when farmers used high prices to buy up tracts of land at high prices, saddling them with heavy debts. The agricultural depression grew steadily worse in the middle 1920s while the rest of the economy flourished.



Editorial cartoon showing US President Calvin Coolidge carrying the McNary-Haugen Farm Relief Bill in a dustpan out to a trash can labeled "VETO," as a distressed figure in the background labeled "Congress" yells "CALVIN!"

McNary–Haugen Farm Relief Act

Farmers blamed the decline of foreign markets and the effects of the protective tariff for their troubles. Farmers had a powerful voice in Congress and demanded federal subsidies, most notably the McNary-Haugen Farm Relief Act. This legislation, which never became law, was a highly controversial plan to address the concerns of farmers by raising the domestic prices of farm products. The act, which was coauthored by Charles L. McNary (R-Oregon) and Gilbert N. Haugen (R-Iowa), proposed that the government buy overproduced domestic wheat and then either store it or export it to foreign markets at a loss.

According to the bill, a federal agency would be created to support and protect domestic farm prices by attempting to maintain price levels that existed before World War I. By purchasing surpluses and selling them overseas, the federal government would take losses that would be paid for through fees against farm producers. Despite attempts in 1924, 1926, 1927, and 1928 to pass the bill, it was vetoed by President Calvin Coolidge and never approved.

electricity, more efficient equipment, better seeds and breeds, more rural education, and better business practices. Hoover advocated the creation of a **Federal Farm Board**, which was dedicated to the restriction of crop production within domestic demand, behind a tariff wall, and maintained that the farmers' ailments were due to defective distribution. The Hoover plan was adopted in 1929, before the October 29 stock market crash.

Mechanization and Urbanization

A popular Tin Pan Alley song of 1919 asked a question with unintended economic ramifications about US troops returning from World War I: "How Ya Gonna Keep 'Em Down on the Farm (After They've Seen Patee?)" In fact, many did not remain down on the farm and instead became part of a great migration of youth from farms to nearby towns and smaller cities. Some of this could be attributed to a desire for something more adventurous than rural life after seeing some of the cultural capitals of Europe, but the migration also was driven by factors such as farm mechanization.

In terms of maintaining the rural population, mechanization proved to be a double-edged sword. By improving production efficiency, mechanization through heavy machinery such as tractors and harvesters improved the quality of produce and made the farms more profitable. On the other hand, mechanization displaced unskilled farm laborers who were no longer needed in the same numbers. This was a direct cause and effect in terms of farmers migrating to urban areas even before the economic devastation of the Great Depression that was to strike the world in 1929.

Federal Farm Loan Bonds

Supply Funds To Finance Farmers

The First Year's Work

The bond of the Federal Loan System should command the attention of all investors.

The Federal Farm Loan System is the one agency of the United States Government which will bring to America month by month, year by year, and decade by decade through all the future a high grade security, issued for the purpose of carrying out a great national agricultural policy.

The whole world looks for salvation to the American farmer.

The American farmer looks for financial help to the Federal Farm Loan System.

The Federal Farm Loan System seeks to enlist the wise investor in its movement to finance the farmer safely, soundly and conservatively, and thus save the world.

There are twelve regional Federal Land Banks, all operated under the inspection, examination and control of the Federal Farm Loan Board, a bureau of the Treasury Department at Washington.

The first of these banks to be organized received its charter March 1, 1917. Others were chartered immediately afterward. The farmers borrow through national farm loan associations. The first of these associations received its charter on March 27, 1917.

On March 31, 1918, associations had been formed to the number of 288, or about four associations to every five counties in the United States.

About 54,000 farmers had joined these associations for the purpose of borrowing money on farm mortgages.

Loans amounting to over \$160,000,000 had been approved by the banks and on over 20,000 of these loans money had been paid to the farmers to the amount of about \$80,000,000.

And since March 31st the work has gone on — new associations have been organized; new applications have been made; new bond issues have been authorized.

And it will go on forever. So long



Buy
Federal Farm Loan
Bonds

Springfield, Mass. Louisville, Ky.
Baltimore, Md. New Orleans, La.
Columbus, S. C. St. Louis, Mo.

St. Paul, Minn. Houston, Texas
Omaha, Neb. Berkeley, Cal.
Wichita, Kans. Spokane, Wash.

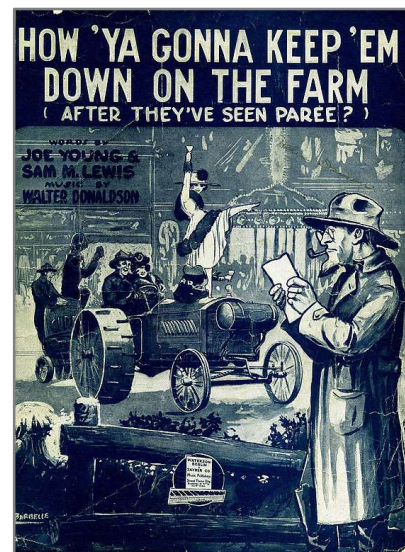
or address:
FEDERAL FARM LOAN BOARD
Treasury Department,
Washington, D. C.

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WHOLESALE INVESTORS: NEWTON BETTER FRUIT

The Hoover-Jardine Plan

Coolidge supported an alternative program put forth by US Commerce Secretary Herbert Hoover and Agriculture Secretary William M. Jardine to modernize farming. The plan was to use more



Sheet music cover

The Artios Home Companion Series

Unit 17: The Great Depression

Teacher Overview

“Once I built a railroad, I made it run. I made it race against time.

“Once I built a railroad, now it’s done. Brother, can you spare a dime?”

– Lyrics by E.Y. “Yip” Harburg

AT THE END OF THE 1920s, the United States boasted the largest economy in the world. With the destruction wrought by World War I, Europeans struggled while Americans flourished. Then, just as America reached a moment of apparent triumph, everything fell apart. The stock market crash of 1929 touched off a chain of events that plunged the United States into the longest, deepest economic crisis of its history.

It is far too simplistic to view the stock market crash as the single cause of the Great Depression. Long-term underlying causes sent the nation into a downward spiral of despair. When the Depression spread across the Atlantic, Europeans bought fewer American products, worsening the slide.

President Hoover tried to forestall the ensuing Great Depression with government enforced efforts. However, these measures failed to produce economic recovery. As he was unable to provide the proper relief from hard times, his popularity decreased as more and more Americans lost their jobs, the economy shrinking with each successive year of his presidency. As middle-class Americans stood in the same soup lines previously graced only by the nation’s poorest, the entire social fabric of America was forever altered.



An impoverished American family living in a shanty.
Photograph by Dorothea Lange, who was employed by the
Farm Security Administration to document the
Depression through the camera lens

Suggested Assignments

In this unit, students will:

- Complete five lessons in which they will learn about the **Great Depression**, journaling and answering discussion questions as they read.
- Define vocabulary words.
- Do some outside research on **two topics** and share what they learn.
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

Happiness and success are not found in the gathering of wealth.

For to the one who pleases Him God has given wisdom and knowledge and joy, but to the sinner He has given the business of gathering and collecting, only to give to the one who pleases God. This is also vanity and striving after wind.

– Ecclesiastes 2:26

World leaders have responsibility to protect their people's rights and govern justly.

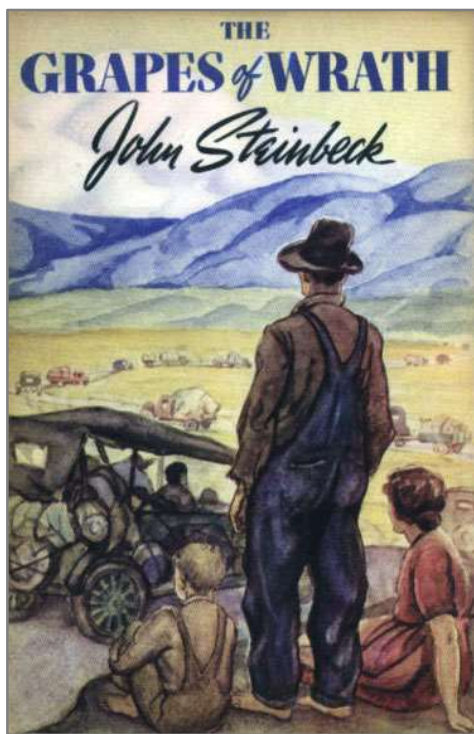
Give justice to the weak and the fatherless; maintain the right of the afflicted and the destitute. Rescue the weak and the needy; deliver them from the hand of the wicked.

– Psalm 82:3-4

Lesson One

History Overview and Assignments The Market Crashes

THE GREAT DEPRESSION resulted from several economic factors in the United States, including an overall decline in demand, imbalances and weaknesses in the economy, faltering demand for housing, and reduced production in the automobile industry. Loans to foreign nations after World War I became problematic in the 1920s as European countries lacked the means to repay the loans, destabilizing American debt markets. Farm prices began to fall in the post-war period and farmers, already deeply in debt, could not pay back their creditors. After the stock market crash on October 29, 1929, banks began to fail in 1930, which caused a massive, nationwide demand on banks as depositors hurried to convert their savings into currency.



First published in 1939, John Steinbeck's novel *The Grapes of Wrath* told of the Joad family's loss and the hardships they encountered during the Great Depression, while trying to reach California and start anew.

Key People, Places, and Events

- Great Depression
- Black Tuesday
- Wall Street Crash of 1929
- Dow Jones Industrial Average
- Federal Reserve
- Hooverville
- Dust Bowl
- Black Sunday
- Boom & Bust
- Banking Act of 1933

Vocabulary

- speculation
- hobo
- protectionism

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article: *The Great Depression, Part One*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Do some research on the **Federal Reserve's response to the Great Depression**. Share what you learn regarding the reasons for the response and the results.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. What happened to America's stock market on "Black Tuesday"?
2. Trace the causes of the Great Depression.
3. How did speculation and buying stock on margin contribute to the economic crisis?
4. What effects followed over the next ten years?
5. What were "Hoovervilles"?
6. Was America's protectionist response beneficial or detrimental?
7. What international influences contributed to the Great Depression?
8. Explain the "boom and bust" theory.
9. What was mandated by the Banking Act of 1933?

Adapted for High School from:

Boundless US and World History

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The Great Depression, Part One

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The **Great Depression** was a decade-long period of unemployment and poverty that began in 1929, the result of an untimely collision of negative economic factors. It became a global economic crisis, the worst by far in the 20th century.

The Great Depression started on October 29, which became known as **Black Tuesday**, with the **Wall Street Crash of 1929**, a stock market crash that rapidly spread worldwide. The crash marked the beginning of a decade of high unemployment, poverty, low profits, deflation, plunging farm incomes, and lost opportunities for economic growth and personal advancement. The Depression showed how intricately interconnected America's national economy was and marked a low point for America in almost every way, with widespread suffering by citizens throughout the land and at most levels of society.

Origins

Several events inevitably led to the Great Depression, although its exact causes are still debated. One of the most significant events was the overall decline in consumer demand. Around 1928, demand for new housing had faltered, subsequently leading to declining sales of building materials and unemployment among construction workers. The

automobile industry and other manufacturers had to reduce production rates, while the prices of agricultural goods also dropped.

A speculative boom had taken hold in the late 1920s, which led hundreds of thousands of Americans to invest heavily in the stock market. Many investors bought shares "on margin," meaning that they purchased them on credit while at the same time taking out loans to pay for those shares. Investors hoped that when the shares sold, they would make enough money to pay back the loans and interest and have some profit for themselves. By August 1929, brokers were routinely lending small investors more than two-thirds of the face value of the stocks they were buying. The loans exceeded \$8.5 billion, more than the entire amount of currency circulating in the United States at the time.

Stock Market Crash

The rising share prices encouraged more people to invest as they hoped the share prices would rise further. **Speculation** thus fueled further rises and created an economic bubble. Speculation is defined as *the purchase of an asset (a commodity, goods, or real estate) with the hope that it will become more valuable at a future date. In finance, it is the practice of engaging in risky financial transactions*

to profit from short-term fluctuations in the market value of a trade-able financial instrument rather than from its underlying financial attributes such as capital gains, dividends, or interest.

Because of margin buying, investors stood to lose large sums of money if the market turned down or failed to advance quickly enough. With the **Dow Jones Industrial Average**, a major US stock market index, just past its September 3 peak of 381.17, the market finally turned down and panic selling started at the New York Stock Exchange, the primary center of American financial activity located on Wall Street in New York City. On October 24, 1929, also known as “Black Thursday,” the value of common stock and shares in the US market dropped by 40 percent and a massive, debilitating economic downward spiral was set in motion.



A solemn crowd gathers on Wall Street following the stock market crash on October 29, 1929.

Impact

The Wall Street crash had a major impact on the United States and world economy, and the psychological effects reverberated across the nation as business became aware of the difficulties in securing capital markets investments for new projects and expansions. The decline in stock prices caused bankruptcies and severe economic difficulties, including contraction of credit, business closures, firing of workers, bank failures, a decrease in the money supply, and other economy-depressing events.

The failure set off a worldwide run on US gold deposits and forced the **Federal Reserve** to raise interest rates. American banks began to fail in October 1930, one year after the crash, when farmers

defaulted on loans. There was no federal deposit insurance during that time, and bank failures were common. Depositors, worried they might lose all their savings, withdrew their deposited amounts (the accounts through which money flows back and forth among financial institutions) and changed them into hard currency (the paper and coins we hold). As withdrawals increased, money circulation throughout the economy slowed. This led to a decrease in the money supply, an increase in interest rates, and a significant decrease in overall investment. Some 4,000 banks and other lenders ultimately failed.

By 1932, unemployment had surged in the US to 24 percent (rising as high as 335 in some countries), while stock prices plummeted by more than 80 percent. More than 85,000 businesses declared bankruptcy. Industries that suffered the most included agriculture, construction, shipping, mining, and logging, as well as durable goods such as automobiles and appliances, whose purchase could be postponed.



A Depression-era shantytown, commonly called a “Hooverville,” near Portland, Oregon.
By Arthur Rothstein (1936)

The economy reached bottom in the winter of 1932–1933. In 1933, unemployment rose to 25 percent, with more than 11 million people seeking work. As the Depression deepened, vast numbers of families were unable to pay rent and were evicted from their homes to stay in “**Hoovervilles**,” the slang term for shantytowns that were contemptuously named after President Herbert Hoover, whose policies were considered to blame for the Depression.

The agricultural losses were especially acute in the Great Depression. Between 1930 and 1936, severe drought conditions existed in America’s Great Plains regions, with soil turning to dust and then blowing across dry, unused fields in what became

known as “**Dust Bowls.**” The high-speed windstorms that helped destroy the farmlands reportedly reached up to 60 miles per hour on April 14, 1935, also known as “**Black Sunday.**”

A great migration occurred in which approximately 200,000 farmers traveled west, hoping to find better land and opportunities in California. Many of these workers did not have money for train or bus tickets and took to illegally hopping onto freight trains, earning them the slang name, “**Hobos.**” The migration also included many families, often with several generations, who traveled together in search of work, food, and a place to live.



Broke, Baby Sick, and Car Trouble! Dorothea Lange’s 1937 photo shows a Dust-Bowl family from Missouri stuck on the side of the road near Tracy, California.

Protectionism

Some believe a change in government policy, specifically a change in interest rates by the federal government, could have slowed the downward steps into the Great Depression. Yet international influences also contributed to the Great Depression. After World War I, nations adopted the practice known as “**protectionism,**” under which foreign goods were subject to tariffs, or import duties, so that foreign products would cost more, and local ones would cost less.

In economics, protectionism is *the economic policy of restraining trade between states (countries) through methods such as tariffs on imported goods, restrictive quotas, and other government regulations.* Protectionist policies protect the producers, businesses, and workers of the import-competing sector in a country from foreign competitors. According to proponents, these policies can counteract unfair trade practices by allowing fair competition between imports and goods and services produced domestically. Protectionists may favor the

policy to decrease the trade deficit, maintain employment in certain sectors, or promote the growth of certain industries.

There is a broad consensus among economists that the impact of protectionism on economic growth (and on economic welfare in general) is largely negative, although the impact on specific industries and groups of people may be positive. The doctrine of protectionism contrasts with the doctrine of free trade, where governments reduce barriers to trade as much as possible.

The United States enacted extremely high tariffs, causing other nations to retaliate by establishing their own tariffs against American goods. Thus, American businesses lost several foreign markets in which they normally sold their goods.

In dollar terms, American exports declined from about \$5.2 billion in 1929 to \$1.7 billion in 1933; not only did the physical volume of exports fall, but the prices fell by about one-third. Hardest hit were farm commodities such as wheat, cotton, tobacco, and lumber.

Additional Economic Factors

International credit structure was another cause of the Depression. At the end of World War I, European nations owed enormous sums of money to American banks, but these debts were rarely repaid, and large banks suffered due to these debts. On a less widespread but still significant front, small American banks were crippled because US farmers could not pay their debts as the overall economy worsened.

Economists still dispute how much weight to give the stock market crash of October 1929 as a cause of the Great Depression. It clearly changed sentiment about and expectations of the future, shifting the outlook from very positive to negative. Many academics see the Wall Street crash of 1929 as part of a historical process called “**boom and bust.**” According to some economists, the crash was merely a historical event in the continuing process of economic cycles. The impact of the crash was merely to increase the speed at which the cycle proceeded to its next level. Economist Milton Friedman’s book, *A Monetary History of the United States*, cowritten with Anna Schwartz, makes the argument that what made the “great contraction” so severe was not the downturn in the business cycle, trade protectionism, or the 1929 stock market crash, but the collapse of the banking system during three waves of panic over the 1930–1933 period.



This photo taken in an alley in the Manhattan borough of New York City in 1935 shows makeshift housing of the type found in Depression-era shantytowns named “Hoovervilles” to place blame on President Herbert Hoover.

Results

In 1932, the Pecora Commission was established by the US Senate to study the causes of the Wall Street crash. The following year, the US Congress passed the Glass-Steagall Act, officially named the **Banking Act of 1933**, mandating a separation between commercial banks, which take deposits and extend loans, and investment banks, which underwrite, issue, and distribute stocks, bonds, and other securities.

The Human Toll

The Great Depression caused widespread homelessness and illness, fueled discrimination, and increased migrant labor.

Migrant laborers, who traveled from farm to farm selling labor by harvesting crops, were excluded from federal and state legislation protecting wages and fair working practices and often received unfair pay.

The Depression also resulted in an increase in racism and discrimination, as African Americans, Hispanics, and women often were denied available jobs in favor of awarding them to white men.

Hoovervilles

The increase in homelessness, due to sudden unemployment and an inability to pay rent, concentrated thousands of Americans in squalid, urban settlements throughout the nation. These became known as “Hoovervilles,” a term coined by Democratic National Committee publicity chief Charles Michelson to slander the name of

Republican President Herbert Hoover, whose policies many people blamed for the stock market crash and ensuing Depression.

Hoovervilles arose in many public areas, including in well-known locations such as Central Park in New York City, where scores of homeless families camped out at the park’s Great Lawn, as well as in New York’s Riverside Park. Some of the men forced to live in these conditions possessed construction skills and were able to build houses out of stone. Most people, however, resorted to building shelters out of cardboard, wood from crates and fences, scraps of metal, or whatever other materials were available to them. These makeshift homes offered scant protection from wind, rain, and the cold of winter. Usually, these settlements had no running water or bathrooms, and living conditions were extremely unsanitary, enabling illness to spread easily. Local authorities did not officially recognize these Hoovervilles and occasionally removed occupants for trespassing on private lands, although they were frequently tolerated or ignored out of necessity.

Democrats coined other terms—such as “Hoover blanket,” an old newspaper used as blanketing and “Hoover flag,” an empty pocket turned inside out—that pressed the idea of the president’s blame for the public misery. “Hoover leather” was cardboard used to line a shoe when the sole wore through, while a “Hoover wagon” was an automobile with horses hitched to it because the owner could not afford fuel.

There were various tactics employed to try to end the suffering of those forced to reside in squalid conditions. Soup kitchens, invented by Benjamin Thompson and run by volunteers, gave free food to homeless Americans, who often received their only daily meal from these establishments.

After Franklin Delano Roosevelt soundly defeated Hoover in the November 1932 presidential election, FDR’s “New Deal” economic recovery plan enacted special relief programs for the homeless under the Federal Transient Service (FTS), which operated from 1933 to 1935. In 1934, the Frazier-Lemke Farm Bankruptcy Act and Taylor Grazing Act also became pivotal tools in the effort to prevent farms from failing and to add livestock feeding areas, both of which helped reduce homelessness. After 1940, the economy recovered, unemployment fell, and shanty eradication programs destroyed all the remaining Hoovervilles.

Lesson Two

History Overview and Assignments

Sinking Deeper

“The ‘Dust Bowl’ exodus was the largest migration in American history within a short period of time. By 1940, 2.5 million people had moved out of the plains states, including 200,000 who moved to California. With their land barren and homes seized in foreclosure, many families were forced to leave farms in Oklahoma, Arkansas, Missouri, Iowa, Nebraska, Kansas, Texas, Colorado, and New Mexico.”

– from the adapted article below



Buried machinery in the “Dust Bowl,” 1936: Farm equipment in South Dakota is left half exposed by one of the many windstorms that swept across the Great Plains during the Dust Bowl period of the Great Depression in the 1930s.

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article: *The Great Depression, Part Two*.
- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Vocabulary

migrant labor
indigent

Discussion Questions

1. What factors led to America’s “Dust Bowl”?
2. Describe the Dust Bowl’s progression and effects.
3. How were migrant laborers affected?
4. How were African Americans, Hispanic workers, and women affected by discrimination during this time?

Adapted for High School from:

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The Great Depression, Part Two

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The “Dust Bowl”

In 1930, a confluence of bad weather and poor agricultural practices compounded the Depression’s

effects on farmers in areas in America’s South and Midwest Great Plains that came to be known as the “Dust Bowl.” The affected area included 1 million

acres centered on the panhandles of Texas and Oklahoma, and adjacent parts of New Mexico, Colorado, and Kansas.

Drought and massive windstorms that threw up giant clouds of dust continued throughout the 1930s, leading to the period being called the “Dirty Thirties.” The dust storms caused major ecological and agricultural damage to American prairie lands, particularly in 1934 and 1936. In 1934, an estimated 75 percent of the United States felt some effect from the storms, including New England, where red snow fell.

The phenomenon was caused by severe drought coupled with decades of extensive farming without crop rotation, fallow fields, cover crops, and other techniques to prevent wind erosion. Farmers grew more and more crops, despite the prices of each of the crops beginning to decline. Deep plowing of the pristine topsoil of the Great Plains displaced the natural deep-rooted grasses that normally kept the soil in place and trapped moisture even during periods of drought and high winds.

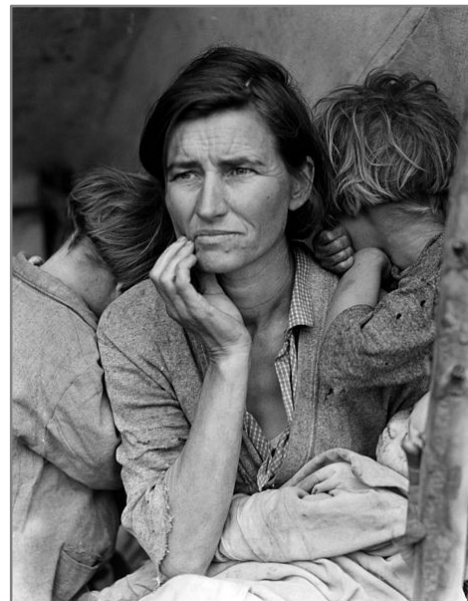
As the 1930s progressed, the soil continued to dry, turn to dust, and blow eastward and southward in large, dark clouds. At times, these clouds blackened the sky, reaching all the way to East Coast cities such as New York and Washington, DC. Much of the soil—carried by prevailing winds, which were themselves strengthened by the dry and bare soil conditions—ended up deposited in the Atlantic Ocean. These immense dust storms, given such names as “black blizzards” and “black rollers,” often reduced visibility to a few feet. During black blizzards, normal activities such as breathing, eating, and walking outside became very difficult tasks. More than 350 houses had to be torn down after one storm alone, and more than 500,000 Americans were left homeless.

The sustained drought and storms damaged the land so badly that overall farm revenue fell by 50 percent in the “Dust Bowl” region. Some residents of the Great Plains, especially in Kansas and Oklahoma, became ill and died of dust pneumonia or malnutrition. While there is no official death toll due to insufficient record keeping, it is believed that up to 7,000 deaths occurred as a result of conditions in the “Dust Bowl.” Already suffering from depressed prices and declining incomes, many farmers were forced to abandon their operations and move to the cities or to agricultural areas in other states in order to survive.

Migrant Labor

The “Dust Bowl” exodus was the largest migration in American history within a short period of time. By 1940, 2.5 million people had moved out of the plains states, including 200,000 who moved to California. With their land barren and homes seized in foreclosure, many families were forced to leave farms in Oklahoma, Arkansas, Missouri, Iowa, Nebraska, Kansas, Texas, Colorado, and New Mexico. Americans primarily migrated west looking for work, although most found that the economic conditions were not much better than the ones they had left, given the pervasiveness of the Great Depression throughout the country.

“**Migrant labor**” is a term applied to those who travel from place to place harvesting crops that must be picked as soon as they ripen, a practice that became a harsh necessity for **indigent** farm workers. There were two kinds of migrant workers: seasonal urban dwellers and permanent migrants who followed crops from one place to another in order to make a living. For both categories, the hard work produced little reward. Because of their exclusion from federal and state legislation that protected workers against exploitation and unfair labor practices, migrant workers earned lower wages than other farm laborers. The jobs were hazardous, while housing and health conditions were extremely poor.



In this famous Dorothea Lange photograph, a destitute mother and two of her seven children take a break from picking peas in California. The 1936 image became synonymous with the plight of migrant farm workers during the Depression.

More of the migrants were from Oklahoma than any other state, earning them the nickname “Okies.” The names “Arkies” and “Texies” were also used but were less common. Ben Reddick, a freelance journalist and later publisher of the Paso Robles Daily Press in California, is credited with first using the term “Ookie” in the mid-1930s to identify migrant farm workers. Reddick noticed the “OK” abbreviation on many of the migrants’ license plates and referred to them in his article as “Oakies.” Californians began calling all migrants by the name, even though many newcomers were not Oklahomans. West Coast residents and some politically motivated writers used “Okie” to disparage these poor, white workers and their families, but also included those of Native-American ancestry such as Cherokees, who were the largest tribal group.

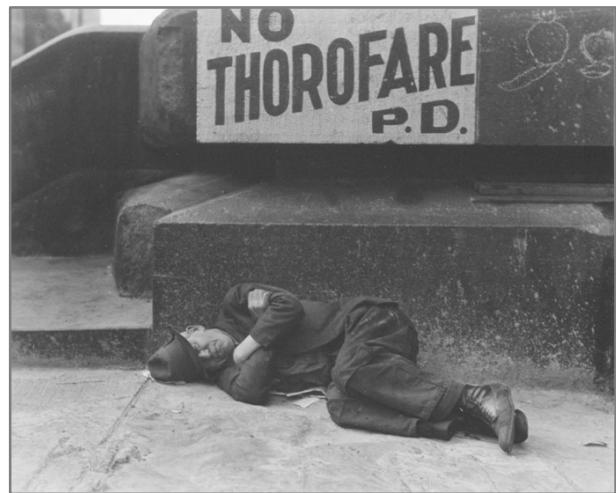
Film star Will Rogers, who had Oklahoma roots, jokingly remarked that Okies moving to California increased the average intelligence of both states. Author John Steinbeck later wrote his novels *Of Mice and Men* and the Pulitzer Prize-winning *The Grapes of Wrath* about migrant laborers and their struggles. The music and writings of Woody Guthrie were also inspired by migrant workers and the “Dust Bowl.”

Discrimination

The Depression was an extremely difficult time for white Americans in the lower classes. Yet it was even worse for other races, especially for African Americans, as the hard economic conditions once again forced virulent racism and discrimination into the open in American society. Unemployment among African American workers grew to almost 50 percent by 1932.

In the Southwest, the claim that Hispanic workers were “stealing jobs” from whites became prevalent. The US Department of Labor deported 82,000 Mexicans between 1929 and 1935, while almost half a million people returned to Mexico either voluntarily or after being tricked or threatened into believing they had no other choice. Many of these people had immigrated legally but lacked the proper documentation to prove their status. Government officials also ignored the legislation automatically designating children born in the country as legal US citizens.

Discrimination against women was also widespread, with many believing sexist claims that women were stealing available jobs from men. In a survey conducted in 1930 and 1931, 77 percent of schools refused to hire married women as teachers, while 63 percent of schools fired females already working as teachers but who then chose to marry.



Under the Queensborough Bridge, by photographer Imogen Cunningham, who documented the lives of the destitute of Oakland, California

Lesson Three

History Overview and Assignments The Bonus March of 1932

MANY IN AMERICA wondered whether the nation would survive the economic crisis of the Great Depression. Although the United States had little history of massive social upheaval against the government, hunger has an ominous way of stirring unrest among any population. As bread riots and shantytowns grew in number, many began to seek alternatives to the status quo. Demonstrations in the nation’s capital increased, as Americans grew increasingly weary with President Hoover’s perceived inaction. The demonstration that drew the most national attention was the Bonus Army March of 1932.



Bonus Army marchers confront the police, who attempted to clear out their campsites during protests in Washington, DC in 1932.

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article: *The Great Depression, Part Three*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. What was the Bonus Army's grievance against the US government?
2. Outline the chain of events that led to the 1932 demonstration in Washington DC.
3. Why did President Hoover oppose the redemption of military service certificates?
4. Describe the veteran encampment on the Anacostia Flats.
5. What happened there on July 28?
6. In what two ways were the veteran grievances finally resolved?

Key People, Places, and Events

Bonus Army
 Veterans of Foreign Wars
 Bonus March
 Civilian Conservation Corps

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Boundless US History

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The Great Depression, Part Three

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The Bonus Army

The “**Bonus Army**” was the name given to protesters who gathered in Washington, DC in the spring and summer of 1932 to demand immediate cash payment of their World War I service certificates. Their march on the capital was effective in bringing to light the misfortune of men who had fought for their country only to be denied government assistance. In addition, the breakup of the Bonus Army encampment by US Army troops

contributed to the eventual election loss of President Herbert Hoover.

Reasons for the March

Many World War I veterans had been out of work since the Great Depression began in 1929. The World War Adjusted Compensation Act of 1924 had awarded them bonuses in the form of certificates. Each service certificate, issued to a qualified veteran soldier, bore a face value equal to the soldier's

promised payment plus compound interest. The certificates, however, could not be redeemed until 1945, which was the root of the protest that followed.

The **Veterans of Foreign Wars** (VFW) pressed the federal government to allow early redemption of military service certificates due to the crushing economic effects of the Great Depression that began in 1929. In January 1932, a march of 25,000 unemployed Pennsylvanians took place in Washington D.C. The group was dubbed “Cox’s Army” after their leader, pro-labor activist and Roman Catholic priest Father James Renshaw Cox of Pittsburgh. At that time, it was the largest demonstration to take place at the nation’s capital and set a precedent for future marches by the unemployed.

In the spring and summer of that year, some 43,000 marchers, including 17,000 World War I veterans, their families, and affiliated groups, came together to demand early payment of service certificates. Led by Walter W. Waters, a former Army sergeant, organizers referred to the assembly of protesters as the “Bonus Expeditionary Force,” echoing the name of World War I’s American Expeditionary Force in Europe, while the media dubbed their protest action the “**Bonus March.**”

Although there was Congressional support for the immediate redemption of the military service certificates for members of the Bonus Army, President Hoover and Republican congressmen opposed such action. They reasoned the government would have to increase taxes to cover the costs of the payout, and thus any potential recovery from the Depression would be slowed.

On June 15, the US House of Representatives passed the Patman Bonus Bill, which would have moved forward the date for World War I veterans to receive cash bonuses. The US Senate, however, defeated the bill and left the early payments unfunded. On June 17, the same day that the Senate rejected the measure, the Bonus Army amassed in Washington.

Bonus Army in Action

Most of the Bonus Army camped in a Hooverville on the Anacostia Flats, a swampy, muddy area across the Anacostia River from the federal core of Washington DC.

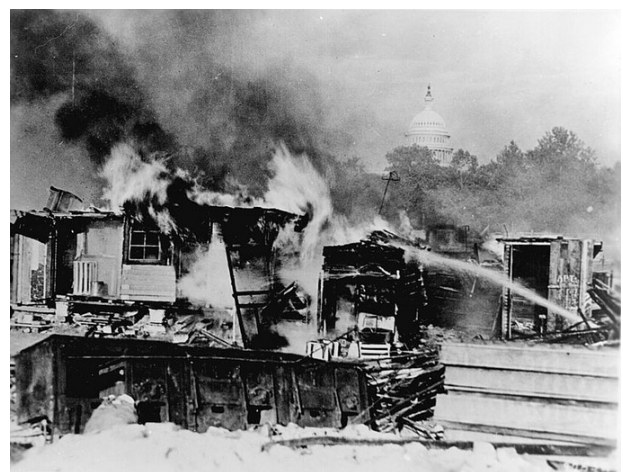
The campsites, built from materials scavenged from a nearby rubbish dump, were tightly controlled by the veterans who laid out streets within the site, built sanitation facilities, and held daily parades. To

live in the camps, veterans were required to register and prove they had been honorably discharged from service. Retired Marine Corps Major General Smedley Butler, one of the most popular military figures of the time, visited the Bonus Army’s camp to back the effort and encourage the protesters.

On July 28, US Attorney General William D. Mitchell ordered the veterans to be removed from all government property. The protesters returned, however, and Washington police who met with resistance shot two veterans, who later died of their wounds. Upon learning of the shootings, Hoover ordered the army to clear the veterans from Washington.

The Army Chief of Staff, General Douglas MacArthur, assembled infantry and cavalry in Pennsylvania Avenue at 4:45 p.m., supported by six tanks under the command of Major George S. Patton. Thousands of civil service workers lined the streets to watch, and Bonus Army marchers cheered for the troops they believed were there to honor them as veterans. Spectators yelled “shame” when the cavalry charged the marchers, followed by infantry troops with fixed bayonets and tear gas, entering the Bonus March campsites and driving out protesters, along with their wives and children.

After burning shelters and belongings, the troops were ordered to stand down by Hoover, but MacArthur ordered another assault, claiming the protest was an attempt to overthrow the federal government. A reported 55 veterans were injured and 135 arrested, one veteran’s wife miscarried her child, and an infant died of what was believed to be a reaction to tear gas.



Evicting the Bonus Army: A photograph of shacks erected by members of the Bonus Army on the Anacostia Flats in Washington, DC burning after an eviction and confrontation with the military in the summer of 1932

Fallout From the March

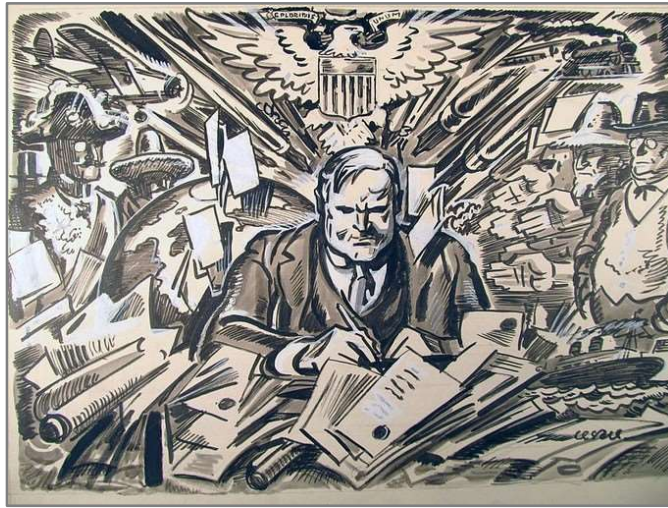
The Bonus Army incident did not affect the military careers of MacArthur or Patton, who was roundly criticized for dismissing an approach by a decorated veteran who had reportedly saved his life during World War I. The violent event, however, proved disastrous for the political career of Hoover, whose chances at reelection were dealt a massive blow by the negative publicity. He lost the 1932 presidential election in a landslide to Democrat Franklin D. Roosevelt.

A second, smaller Bonus March in 1933 at the start of the Roosevelt administration was defused with an offer of jobs for veterans in the **Civilian Conservation Corps (CCC)** at Fort Hunt, Virginia. Most of the marchers accepted jobs in the CCC, a newly created public work-relief program that lasted through 1942. Those who chose not to work for the CCC by the May 22 deadline were given transportation home from Washington. In 1936, Congress overrode President Roosevelt's veto and paid the veterans their bonuses years early.

Lesson Four

History Overview and Assignments Attempts at Recovery

AS THE YEARS of President Hoover's presidency passed and the country slipped deeper and deeper into its quagmire, he would receive great blame. Somebody had to be blamed, and many Americans blamed their president.



President Herbert Hoover, depicted in a March 1929 political cartoon, took up a number of federal initiatives intended to reverse the economic damage caused by the Wall Street crash of 1929 and the Great Depression that followed.

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article: *The Great Depression, Part Four*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

Mexican Repatriation Program
Tariff Act of 1930
Hoover Moratorium

Revenue Act of 1932
Emergency Relief and Construction Act
Reconstruction Finance Corporation

Discussion Questions

1. What were President Hoover's concerns regarding excessive government intervention?
2. Explain what is meant by the statement: "He emphasized that rugged individualism was not laissez-faire economics, which he denounced."
3. Outline the measures put in place during Hoover's administration to address America's economic woes and discuss the political and economic results of each.
4. What arguments were made regarding protectionism vs adherence to the gold standard with respect to international effects of the Depression?

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The Great Depression, Part Four

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Hoover's Efforts at Recovery

President Hoover attempted to stem the Great Depression but was thwarted by political influences, economic realities, and his own ideals.

President Hoover believed that self-reliance and public-private cooperation, rather than excessive federal government intervention, were the paths to recovery from the Great Depression. Despite calls for greater government assistance, Hoover refused to fund welfare programs that he believed would reduce incentives to work.

Rugged Individualism

"Rugged individualism" was a term Hoover used often during his presidency to explain the idea that individuals should be able to help themselves without government involvement in personal economic affairs or national economics in general. A libertarian, Hoover's own rugged individualism may have resulted from his frustration with the unprecedented government involvement in the economy during World War I. He emphasized that rugged individualism was not *laissez-faire* economics, which he denounced.

Hoover entered office in March 1929 with a plan to reform the nation's regulatory system, holding that a federal bureaucracy should have limited regulation over a country's economic system. A self-described Progressive and reformer, Hoover saw the presidency as a vehicle for improving the conditions of all Americans by encouraging public-private cooperation. He termed this relationship as "volunteerism" and considered it preferable to government coercion or intervention, both of which he believed were in opposition to the American ideals of individualism and self-reliance.

Hoover said that "given the chance to go forward

with the policies of the last eight years, we shall soon, with the help of God, be in sight of the day when poverty will be banished from this nation." He added that, "we in America today are nearer to the final triumph over poverty than ever before in the history of any land." These statements came mere months before the Wall Street crash of October 29, 1929, which opened a chapter of American history that would redefine an impoverished society.

A strong proponent of balanced budgets and unwilling to run a deficit to fund welfare programs, Hoover carried his idea of rugged individualism into the Great Depression that followed the crash, insisting that the federal government should not interfere with the American people during the economic crisis. Providing large-scale humanitarian efforts, Hoover feared, would injure, "the initiative and enterprise of the American people."

Yet in spite of his personal libertarian beliefs, Hoover still pursued policies aimed at pulling the country out of the Depression. Some of his major initiatives, however, were misguided and negatively impacted both the economy and American society.

Mexican Repatriation

In 1929, Hoover authorized a **Mexican Repatriation Program** with the stated intention of combating rampant American unemployment, reducing the burden on municipal aid services, and removing people who were considered usurpers of American jobs. This has been perceived as an attempt by the administration to use immigrants as a scapegoat to divert criticism and regain the support of the US organized labor movement.

Hoover endorsed a plan to deport "foreigners" with measures that included arresting participants in labor protests and farm strikes, charging them with

illegal activities or being illegal immigrants, and deporting them. This focus on labor garnered public support for further actions by immigration agents, including mass arrests and arbitrary deportations.

Smoot-Hawley Tariff

Despite the objections of many economists, Hoover signed the **Tariff Act of 1930**, commonly called the “Smoot-Hawley Tariff,” which raised the entry tax on more than 20,000 items imported from foreign countries to historically high levels.

Signed into law on June 17, 1930, and sponsored by Senator Reed Smoot of Utah, the Republican chairman of the Senate Finance Committee, and Representative Willis C. Hawley of Oregon, the Republican chairman of the House Ways and Means Committee, the act encouraged the purchase of American-made products by increasing the cost of imported goods. It also was expected to garner revenue for the federal government and protect US farmers from foreign competition.

By the time the tariff passed into law, however, the economic Depression had spread through much of the world, spurring other nations to retaliate by increasing their own tariffs on American-made goods and subsequently lowering the overall amount of international trade. This worsened the Great Depression by reducing American imports and exports by more than half.

A petition signed in May 1930 by 1,028 US economists had asked Hoover to veto, rather than pass, the tariff act. Automobile magnate Henry Ford visited the White House in an attempt to convince Hoover to veto the bill, while J.P. Morgan CEO Thomas W. Lamont was quoted as saying he “almost went down on my knees to beg Herbert Hoover to veto the asinine Hawley-Smoot tariff.” Hoover himself opposed the bill, calling it, “vicious, extortionate, and obnoxious” due to its undermining of his pledge to international economic cooperation. He yielded to pressure from within his own party and the business community, however, and signed the bill, which was later used against him by Franklin Delano Roosevelt in the 1932 presidential election that tossed Hoover from office.

Moratorium and NCC

On June 20, 1931, the president issued the so-called **Hoover Moratorium**, his proposal for a one-year halt in reparation payments by Germany to France as well as payments of Allied war debts to the United States. This was met with fierce opposition

among a large segment of Americans and especially by France, which had suffered significant losses to Germany during World War I. The moratorium, however, gained the support of 15 nations by early July and earned congressional approval in December. Yet it did little to ease the continuing economic decline. As the moratorium neared its expiration, representatives from Britain, France, and Germany met from June 16 to July 9, 1932, at the Lausanne Conference in Switzerland to find a permanent solution. Yet a working compromise was never established and by the start of World War II, reparations payments had stopped completely.

Hoover also urged the major US banks to form a consortium known as the “National Credit Corporation (NCC)” in 1931. The NCC exemplified Hoover’s belief in volunteerism as a mechanism for aiding the economy. He encouraged NCC member banks to provide loans to smaller banks in order to prevent their collapse. The banks within the NCC were often reluctant to provide loans and usually required small banks to provide their largest assets as collateral. It quickly became apparent the NCC was incapable of fixing the problems it was designed to solve.

Hoover and Congress also approved the Federal Home Loan Bank Act to spur new home construction and reduce foreclosures. The plan initially seemed to work as the rate of foreclosures dropped, but for many, it was seen as too little, too late, with tens of thousands of Americans homeless.

Final Attempts

By 1932, unemployment had reached 24.9 percent; a drought persisted in the central United States, particularly in Oklahoma and Texas; businesses and families had defaulted on loans in record numbers, and more than 5,000 banks had failed.

To pay for government relief programs and to make up for lost revenue, Hoover agreed to roll back several tax cuts his administration had enacted on higher-bracket incomes. Prior to the Great Depression, Hoover’s first Treasury secretary, Andrew Mellon, had proposed and enacted numerous tax cuts under presidents Warren G. Harding and Calvin Coolidge, which cut the top income tax rate from 73 percent to 24 percent. When combined with the sharp decline in incomes during the early Depression, the result was a serious deficit in the federal budget.

Desperate to increase federal revenue, Congress

approved one of the largest tax increases in American history, the **Revenue Act of 1932**. Income tax on the highest incomes rose from 25 percent to 63 percent, the estate tax was doubled, and corporations were taxed at an increased rate of 13.75 percent. A “check tax” placed a two-cent levy on all bank checks, equal to more than 30 cents in today’s economy. Hoover also encouraged Congress to investigate the New York Stock Exchange, resulting in various reforms.

The final Hoover administration attempt to rescue the economy occurred in 1932 with the passage of the **Emergency Relief and Construction Act**, which authorized funds for public works programs and the creation of the **Reconstruction Finance Corporation (RFC)**, an independent agency whose purpose was to provide government-secured loans to financial institutions, railroads, and farmers.

The agency gave \$2 billion in aid to state and local governments and made loans to banks, railroads, mortgage associations, and other businesses. Though the RFC had minimal impact at the time, it was later adopted by Franklin D. Roosevelt and greatly expanded as part of his New Deal economic recovery plan. In fact, a member of FDR’s policy team known as the “Brain Trust” later remarked that although no one would say so at the time, “practically the whole New Deal was extrapolated from programs that Hoover started.”

Herbert Hoover has been criticized for taking a laissez-faire approach to the Depression, relying on “volunteerism” through churches and social groups to provide public assistance. Yet in his memoirs, he claimed to have rejected Treasury Secretary Mellon’s suggested “leave-it-alone” approach and noted that he called many business leaders to Washington, urging them to refrain from terminating workers or cutting wages.

INTERNATIONAL TRADE DURING THE GREAT DEPRESSION

Many economists have argued that the sharp decline in international trade after 1930 worsened the Depression, especially for countries significantly dependent on foreign trade.

Most historians and economists partly blame the American Smoot-Hawley Tariff Act for worsening the Depression by seriously reducing international trade and causing retaliatory tariffs in other countries. Others argue against the notion that

protectionism caused the Great Depression or made the decline in production worse, and that adherence to the gold standard forced many countries to resort to tariffs, when instead they should have devalued their currencies.

The gold standard was the primary transmission mechanism of the Great Depression, driving down the currency of even nations with no banking crisis. The sooner nations got off the gold standard, the sooner they recovered, and every major currency eventually left the gold standard during the Great Depression.

The crisis hit Germany hard. The impact of the Wall Street Crash forced American banks to end the new loans that had been funding Germany’s war repayments. The financial crisis escalated out of control and mid-1931, starting with the collapse of Austria’s largest credit providing bank in May. This put heavy pressure on Germany, which was already in political turmoil.

In May 1930, Canada, the country’s most loyal trading partner, retaliated against the Smoot-Hawley Tariff Act by imposing new tariffs on 16 products that accounted altogether for around 30% of US exports to Canada. Canada later also forged closer economic links with the British Empire via the British Empire Economic Conference of 1932. France and Britain protested and developed new trade partners. Germany developed a system of *autarky*, a self-sufficient, closed economy with little or no international trade.

While foreign trade was a small part of overall economic activity in the US, concentrated in a few businesses like farming, it was a much larger factor in many other countries. The average rate of duties on dutiable imports jumped from 25% during the twenties to 50% during the first half of the thirties.

In 1932, with the Depression having worsened for workers and farmers despite Smoot and Hawley’s promises of prosperity from a high tariff, the two lost their seats in the elections that year.

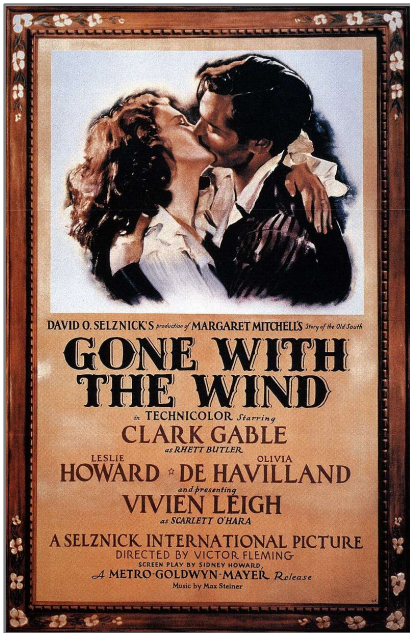


Relatives and friends wave goodbye to a train carrying 1,500 persons being expelled from Los Angeles back to Mexico on August 20, 1931.

Lesson Five

History Overview and Assignments Social and Cultural Effects of the Depression

ESCAPING HARD TIMES: The 1930s escapist culture involved inexpensive entertainment such as music, radio, and films that diverted attention from life's hardships. Spending money on entertainment was a luxury that few could afford during the Depression. The US government offered assistance programs to many artists, who in turn provided cheap or free amusements to the American public.



Gone With the Wind, theatrical pre-release poster

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article:
The Great Depression, Part Five.
- Narrate about today's reading using the appropriate notebook page.
- Instead of answering discussion questions, research **one of the songs or movies** mentioned in today's reading and share what you learn.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

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Boundless US History

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The Great Depression, Part Five

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Escaping Hard Times

As the United States faced its longest and deepest economic downturn in the Great Depression, for most people, spending money on entertainment was out of the question. The culture of escapism of the 1930s revolved around finding innovative and inexpensive forms of entertainment that diverted attention from the pressing problems and hardships of everyday life for millions of Americans.

Music

As it had for hundreds of years, music continued to enjoy wild popularity as a form of entertainment.

In the 1930s, however, it took on added importance as music cost the audience little or nothing and diverted public attention from everyday economic troubles. Americans loved a variety of music genres in the 1930s, with big band and jazz music maintaining popularity following their explosion onto the national cultural scene in the previous decade.

Following World War I, the Great Migration's movement of jazz musicians from New Orleans to major northern cities such as Chicago and New York led to a wider dispersal of jazz as different styles developed in different cities. As the 1920s progressed, jazz rose in popularity and helped to

generate a cultural shift. Because of its popularity in speakeasies, along with its proliferation due to the emergence of more advanced recording devices, jazz became very popular in a short amount of time, with stars including Cab Calloway and Chick Webb.

Big-band jazz, like that of James Reese in Europe and Fletcher Henderson in New York, was also popular on the radio and brought an African-American style and influence to a predominantly white cultural scene. Duke Ellington and his big band played several types of music from blues to gospel to jazz and more. One of his most successful songs was “It Don’t Mean a Thing (If It Ain’t Got That Swing).”

In the 1930s, listening to radio broadcasts became a source of nearly free entertainment for millions of Americans, and radio stations had a little bit of everything for listeners of all ages. Since the 1920s, radio had provided Americans with a trendy new avenue for exploring unfamiliar cultural experiences from the comfort of their living rooms. The most popular type of radio show was a “potter palm,” an amateur concert and big-band jazz performance broadcast from New York and Chicago.

In the 1930s, American adults frequently listened to newscasts, radio theater, soap operas, religious sermons, and entertainment programs. *Amos ‘n’ Andy*, while controversial for its racial stereotypes, was a popular comedy and drama beginning in the late 1920s on NBC radio, boasting as many as 40 million listeners in 1930–1931 and lasting into the 1950s on radio and as a television series. Singer Bing Crosby first gained recognition on radio shows in the early 1930s, while famed comedy duo Abbott and Costello made their first known radio performance on *The Kate Smith Hour* in 1938.

The *Grand Ole Opry* program, highlighting the biggest stars of the country-music genre, became extremely popular following its launch on November 28, 1925, as a one-hour, radio “barn dance” in Nashville, Tennessee. Its popularity swelled in the 1930s as singers and musicians performed country, bluegrass, folk, and gospel music, as well as comedic performances and skits. The show, which is still aired weekly, helped launch the careers of numerous country music luminaries such as Hank Williams, Patsy Cline, Bill Monroe, the Carter Family, Minnie Pearl, Dolly Parton, and Reba McEntire.

One of the most popular radio shows for young children in the 1930s was *Little Orphan Annie*, based on a newspaper cartoon strip created by Harold Gray that first appeared in the *New York*

Daily News in 1924. The strip, about an adventurous young girl with an equally daring pet dog named Sandy and a foster father called Daddy Warbucks, was enjoyed by children as well as adults attracted to its political commentary targeting subjects such as organized labor, communism, and FDR’s New Deal.



Little Orphan Annie, from *The Film Daily* (1932)

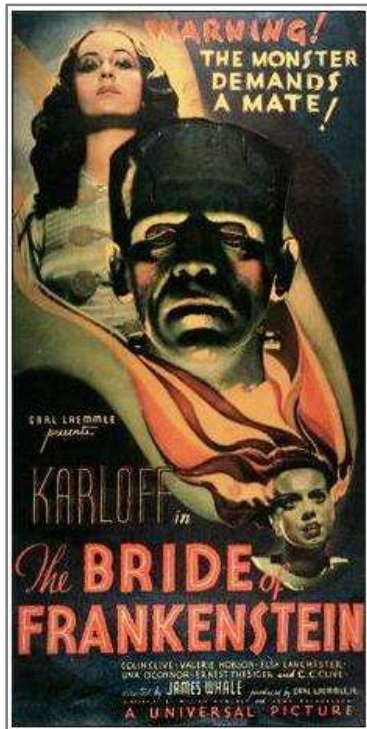
The strip was adapted to a 15-minute radio program that debuted on WGN in 1930 before going national on NBC’s Blue Network beginning in April 1931. The show was so loved that merchandise such as Annie pins became popular items for children. At its height, the radio program had an estimated six million listeners and remained on the air until 1942. There were two film adaptations in the 1930s, the first by David O. Selznick in 1932 for RKO and the next by Paramount in 1938. The show later saw a huge revival as a theater musical, appearing first on Broadway from 1977 through 1983 and appearing internationally on stage and screen ever since.

Films

Following on the great developments in film of the 1920s, with silent films becoming “talkies” and black-and-white films gradually turning to color, the 1930s saw the release of numerous films and other moving-picture fare that are still highly cherished today.

By the 1930s, all of America’s theaters were owned by the Big Five studios: MGM, Paramount Pictures, RKO, Warner Bros., and 20th Century Fox. They released a flood of films to satisfy the public clamor for escapism, a departure into a world of fantasy that provided a way to forget the pain and drudgery of the period. *Frankenstein* (1931), *Dracula* (1931), *King Kong* (1933), *The Invisible Man* (1933), *The Bride of Frankenstein* (1935), and *The Wizard of Oz* (1939) were all examples of films

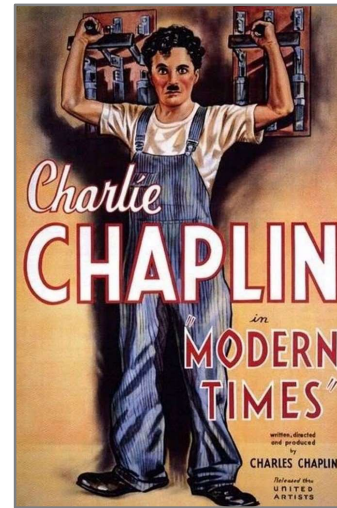
that strayed outside the confines of reality. At the same time, romance and dramas such as *It Happened One Night* (1934), *Mutiny on the Bounty* (1935), *The 39 Steps* (1935), and *Gone With the Wind* (1939) cemented themselves in the pantheon of timeless films.



Films such as *The Bride of Frankenstein* (1935) and *Gone With the Wind* (1939) entertained Americans by the thousands despite the hardships brought by the Great Depression.

Comedies were popular films in the 1930s, as a good laugh eased the mind in a time of adversity. Charlie Chaplin was perhaps the world's biggest film star, maintaining his stature as a top box-office draw with comedies such as *City Lights* (1931) and *Modern Times* (1936). *The Marx Brothers* also provided popular big-screen laughs with *Monkey Business* (1931), *Horse Feathers* (1932), and *Duck Soup* (1933).

Films depicting America's fight against the Great Depression became popular as well. Chaplin's *Modern Times* shows his character, The Little Tramp, fighting through the pitfalls of life during the Depression and was named to the American Film Institute's list of 100 Greatest Films. Other examples of life in the Depression include *A Man's Castle* (1933) starring Spencer Tracy, *Our Daily Bread* (1934), *My Man Godfrey* (1936), and the highly acclaimed *Of Mice and Men* (1939). Toward the late 1930s, movies from foreign countries also began to play in American theaters.



Modern Times: Charlie Chaplin's 1936 film, *Modern Times*, depicted life in the Great Depression with comedy and empathy and has been named one of the 100 greatest films.

The late 1920s saw the emergence of Walt Disney and his eponymous studio. Disney's marquee character, Mickey Mouse, who had made his debut in *Steamboat Willie* on November 18, 1928, at the Colony Theater in New York City, would go on to star in more than 120 cartoon shorts, as well as in *The Mickey Mouse Club* and other specials. This jump-started Walt Disney Studios and led to the creation of numerous other characters going into the 1930s. Beloved Disney films of the 1930s included *The Three Little Pigs* (1933) and *Snow White and the Seven Dwarfs* (1937). *Snow White* was the first full-length traditionally animated feature film and the first Disney animated feature film.



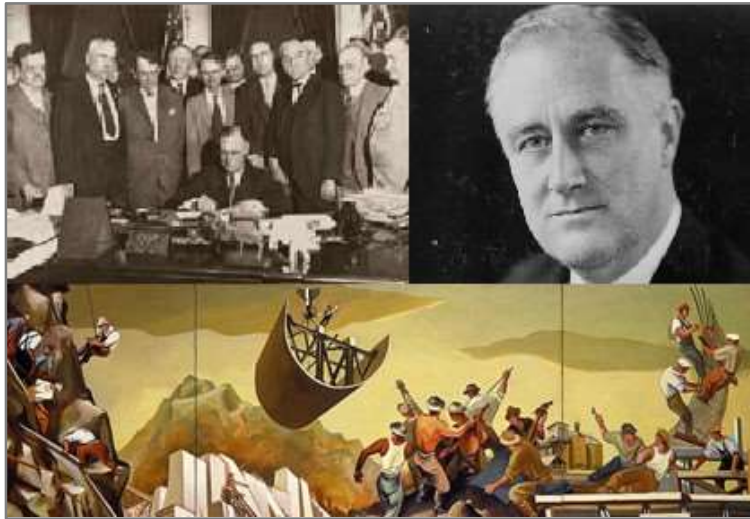
The famous "Heigh-Ho" sequence from *Snow White* was animated by Shamus Culhane. *Snow White and the Seven Dwarfs* was the first animated feature in the Disney animated features canon. It was produced by Walt Disney Productions, premiered on December 21, 1937, and was originally released to theatres by RKO Radio Pictures on February 8, 1938.

The Artios Home Companion Series

Unit 18: The Roosevelt Era

Teacher Overview

WHEN AMERICA HIT ROCK BOTTOM, Americans expected bold leadership. President Herbert Hoover was perceived as doing nothing to help when the nation was in its darkest hour. When the votes were tallied in 1932, Americans made a strong statement for change and sent Franklin Delano Roosevelt to the White House. Ironically, Roosevelt made few concrete proposals during the campaign, merely promising “a new deal for the American people.” The plan that ultimately emerged during his presidency was among the most ambitious in the history of the United States.



Top left: The Tennessee Valley Authority, part of the New Deal, being signed into law in 1933.
Top right: FDR (President Franklin Delano Roosevelt) was responsible for the New Deal.
Bottom: A public mural from one of the artists employed by the New Deal's WPA program

Suggested Assignments

In this unit, students will:

- Complete six lessons in which they will learn about **FDR and the New Deal**, journaling as they read.
- Instead of using discussion questions, this unit will focus on note-taking skills in an outline format. Directions are given in each lesson, using the website found on their **ArtiosHCS** curriculum website for this Unit.
- Write a five-paragraph essay evaluating the **benefits and detriments of the New Deal**.
- Define vocabulary words.
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

Happiness and success are not found in the gathering of wealth.

For to the one who pleases Him God has given wisdom and knowledge and joy, but to the sinner He has given the business of gathering and collecting, only to give to the one who pleases God. This is also vanity and striving after wind.

– Ecclesiastes 2:26

World leaders have responsibility to protect their people's rights and govern justly.

Give justice to the weak and the fatherless; maintain the right of the afflicted and the destitute. Rescue the weak and the needy; deliver them from the hand of the wicked.

– Psalm 82:3-4

Lesson One

History Overview and Assignments FDR's Economic Rescue Begins

FRANKLIN DELANO ROOSEVELT'S major legacies include the social policies of the New Deal, redefining the role of the executive power and creating a shift in American public thought regarding the relationship between the people and the federal government. America's 32nd president, Franklin Delano Roosevelt, was elected four times and held the office longer than any other president in American history.



Original of FDR taken at 1944 Official Campaign Portrait session by Leon A. Perskie, Hyde Park, New York, August 21, 1944. Gift of Beatrice Perskie Foxman and Dr. Stanley B. Foxman. August 21, 1944

This file is licensed under the Creative Commons Attribution 2.0 Generic license by FDR Presidential Library & Museum.

Suggested Reading and Assignments

- Read the combined article:
Roosevelt and the First New Deal, The New Deal, Part One, and Critical Interpretations of the New Deal.
- Narrate about today's reading using the appropriate notebook page. Be sure to include key people, events, and dates within the narration.
- For each heading listed in today's article, create an outline showing the main points made by the author. Use the website found on your **ArtiosHCS** curriculum website for this unit to explore the use of outlines.
- Begin writing a five-paragraph essay evaluating the **benefits and detriments of the New Deal.**
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

Franklin Delano Roosevelt
Federal Deposit Insurance Corporation (FDIC)
First New Deal
Emergency Banking Act
Agricultural Adjustment Administration (AAA)
Tennessee Valley Authority (TVA)
National Recovery Administration
Federal Emergency Relief Administration
Civilian Conservation Corps (CCC)
Civil Works Administration

Second New Deal
National Labor Relations Board (NLRB)
Works Progress Administration
Social Security Act
Housing Act
Fair Labor Standards Act
Judicial Procedures Reform Bill of 1937
Conservative Coalition
Charles Coughlin

Adapted for High School from:
Boundless US History
source: courses.lumenlearning.com
Roosevelt and the First New Deal,
The New Deal, Part One,
and
Critical Interpretations of the New Deal
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Franklin Delano Roosevelt's Administration *Democratic: 1933–1945*

President Hoover lost the presidential election of 1932 to Democrat **Franklin Delano Roosevelt** in a landslide, and Roosevelt's economic recovery plan, called the New Deal, instituted unprecedented programs for relief and reform. In 1933, Roosevelt created the **Federal Deposit Insurance Corporation (FDIC)**, which provided a legal protection against bank losses.



Bank sign indicating the original insurance limit offered by the FDIC of \$2,500 in 1934

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The First New Deal (1933-35)

First New Deal agenda—a series of relief and recovery programs designed to stabilize and energize the economy and directly support unemployed and poverty-stricken Americans—was a large-scale response built around the idea of the central government's intervention. In short, the federal government introduced many large-scale programs and laws that had a direct impact on the life of Americans (e.g., creating jobs through massive public projects, providing direct financial support, etc.) and pushed vast legislation that regulated the market and labor relations as well as proposed social reforms. Major programs and reforms introduced under the New Deal were:

All banking transactions were suspended. The legislation that followed this proclamation was the **Emergency Banking Act**, which enabled the government to close weak banks and reopen more stable banks. The initiative helped to rebuild trust in

the US banking system. Roosevelt also prohibited the export of gold from the United States and thus took the country off the gold standard (1933).

The creation of the **Agricultural Adjustment Administration (AAA)** (1933). Among many initiatives, AAA provided farm subsidies in exchange for curbed agricultural production (farmers would not cultivate all of the land on their farms) and manipulated farm product prices by buying and temporarily withholding products from the market.

The **Tennessee Valley Authority (TVA)** (1933) was the first large-scale public works project. It created short- and long-term jobs by building and operating a hydroelectric project in the valley of the Tennessee River.

The **National Recovery Administration** (1933) allowed industries to create codes that would regulate and curb unfair competition. The Supreme Court declared NRA unconstitutional in 1935.

The **Federal Emergency Relief Administration** (FERA; initiated by Hoover) created government, mostly unskilled, jobs. The program was replaced by the Works Progress Administration in 1935.

The **Civilian Conservation Corps (CCC)** (1933) put large numbers of men at work in natural resources projects (e.g., in national forests). The initiative combined conservation efforts with creating employment.

The **Civil Works Administration** (1933/34) provided temporary jobs to millions of unemployed.

In addition, stock markets around the world enacted measures to suspend trading in the event of rapid declines, seeking to prevent panic sales.

Second New Deal (1935–38)

While the **Second New Deal** was a continuation of the First New Deal, reforms and programs labeled as the Second New Deal were less a result of the earlier sense of emergency and more a reflection of bolder attitudes. The Supreme Court declared some of the First New Deal programs unconstitutional and Roosevelt followed with an

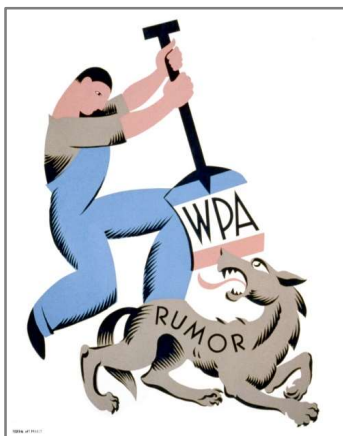
agenda that focused more on the question of social justice. He pushed more pro-labor/social reform and anti-business initiatives, but historians caution against seeing Roosevelt as anti-capitalist. The New Deal was always about fixing capitalism rather than replacing it with a state-regulated economy. The most important programs of the second stage of the New Deal were:



Poster for Works Progress Administration encouraging laborers to work for America, showing a farmer and a laborer

The National Labor Relations Act (1935; known also as the Wagner Act), which established the **National Labor Relations Board** (1935). The NLRA supported the rights of workers to organize and bargain collectively. It also significantly curbed some of the practices that could harm the welfare of workers. The act remains a groundbreaking statute in United States labor law.

The **Works Progress Administration** (1935) created millions of jobs by employing mostly unskilled men in massive public works projects (building bridges, parks, roads, etc.).



Poster showing a man with WPA shovel attacking a wolf labeled rumor

The **Social Security Act** (1935) established the welfare system by providing financial support for dependent minors, the disabled, and the elderly. It also introduced unemployment insurance.

The **Housing Act** (1937) provided funds for low-cost public housing for the poorest families.

The **Fair Labor Standards Act** (1938) was the first federal law that included a national minimum wage and instituted the 40-hour week as the standard work week.

The Court Packing Plan

In the aftermath of the 1936 election, Roosevelt proposed the **Judicial Procedures Reform Bill of 1937** that would be commonly known as the “court-packing plan.” Its aim was to add up to six more justices to the US Supreme Court, one for each member of the court over the age of 70 years and 6 months. The goal was to change the political balance of the court and ensure the court’s support for the New Deal legislation. The proposal provoked vast opposition, even among some liberals. It also united conservatives in both parties. While Burton Wheeler, a progressive Democrat from Montana, played the role of the public voice of the alliance that formed in opposition to the court-packing plan, conservative Democratic senators—Carter Glass, Harry Flood Byrd, and Josiah Bailey—were critical to collecting enough opposing votes in Congress. Roosevelt realized that the bill had no chance of being passed and a compromise was negotiated that did not alter the existing balance in the court.

Conservative Coalition

The court-packing plan strengthened conservative opposition to the New Deal. By 1937, an informal yet strong group of congressmen and representatives opposing the New Deal formed in Congress. Known as the **Conservative Coalition** (at the time, the term “conservative” referred to the opponents of the New Deal and did not imply any specific party affiliation), it initiated a conservative alliance that, with modifications, shaped Congress until the 1960s. In 1937, Bailey released a “Conservative Manifesto” that presented conservative philosophical tenets, including the line, “Give enterprise a chance, and I will give you the guarantees of a happy and prosperous America.” The manifesto called for reduced government spending, a balanced budget, and lower taxes. It also emphasized the importance of private enterprise and suggested that the position of unions was too

powerful. Over 100,000 copies were distributed, and the document marked a turning point in terms of congressional support for the New Deal legislation. The coalition's members did not form a solid anti-New Deal legislation voting bloc. Instead, they responded to each proposed law depending on how much, in their opinion, it violated the conservative principles that they supported.

The "Radio Priest"

"Father Charles Coughlin, a Catholic priest, born to American citizens then living in Canada, first took to the airwaves in Detroit in 1926, broadcasting weekly sermons over the radio. By the early 1930s the content of his broadcasts had shifted from theology to economics and politics. Just as the rest of the nation was obsessed by matters economic and political in the aftermath of the Depression, so too was Father Coughlin. Coughlin had a well-developed theory of what he termed "social justice," predicated on monetary "reforms." He began as an early Roosevelt supporter, coining a famous expression, that the nation's choice was between "Roosevelt or ruin." Later in the 1930s he turned against FDR and

became one of the President's harshest critics. His program of "social justice" was a very radical challenge to capitalism and to many of the political institutions of his day. Father Coughlin's influence on Depression-era America was enormous. Millions of Americans listened to his weekly radio broadcast. At the height of his popularity, one-third of the nation was tuned into his weekly broadcasts. In the early 1930s, Coughlin was, arguably, one of the most influential men in America.

– Source: *The New Deal: Part II*,
<https://socialwelfare.library.vcu.edu/wp-content/uploads/2012/11/Coughlin-2.jpg>

The results of the 1938 midterm election demonstrated that the dissatisfaction with New Deal policies grew. In the Democratic primaries, Roosevelt endorsed the challengers of his conservative opponents, but the anti-New Deal incumbents won. In the national election, more conservative candidates won seats in Congress with Republicans recording substantial gain in both the House and Senate.

Lesson Two

History Overview and Assignments Enacting the Changes

THE NEW DEAL was an unprecedented plan that envisioned large-scale programs and reforms designed to support struggling Americans, boost the economy, and prevent similar disasters in the future. A popular narrative presents the New Deal as a series of programs that responded to the Great Depression with "3 Rs"—relief, recovery, and reform. Relief was direct, immediate support for unemployed and poverty-stricken Americans. Recovery meant bringing the economy back to the level of stability and prosperity. Reform entailed introducing measures that would prevent a similar crisis in the future.



This image is a work of a Works Progress Administration employee, taken or made as part of that person's official duties. Mural detail, *Mail Transportation, San Pedro Post Office, San Pedro, California*, by Fletcher Martin (c.1935)

Suggested Reading and Assignments

- Review the vocabulary, then read the article: *The New Deal, Part Two*.
- Narrate about today's reading using the appropriate notebook page. Be sure to include key people, events, and dates within the narration.
- For each heading listed in today's article, create an outline showing the main points made by the author. Use the website found on your **ArtiosHCS** curriculum website for this unit to explore the use of outlines.
- Continue writing your five-paragraph essay evaluating the **benefits and detriments of the New Deal**.
- Define the vocabulary word in the context of the reading. Write the word and its definition in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

New Deal Coalition
Agricultural Adjustment Act of
1938

Vocabulary

plethora

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The New Deal, Part Two

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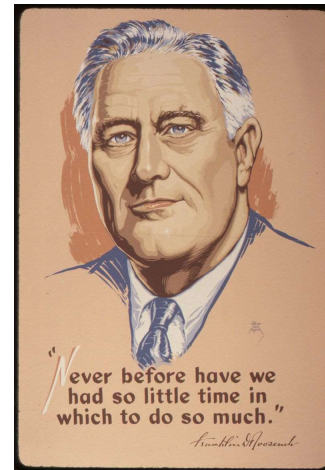
The New Deal Coalition

The 1932 election marked the beginning of the process when a wide and diverse base of voters, many of whom had not supported the Democratic Party before, turned toward Democrats. The groups that overwhelmingly aligned with Democrats and Roosevelt's New Deal agenda formed what would be known as the **New Deal Coalition**. The New Deal Coalition emerged in 1932 but solidified during the 1936 election. It consisted of recent European immigrants and their descendants, organized labor and the industrial working class, city "machines," progressive intellectuals, farmers, white Southerners, and African Americans. Although African Americans did not benefit from the New Deal as much as white Americans, their loyalty shifted gradually, mostly because of local Democratic organizations' increasing interest in the plight of African Americans and not because of Roosevelt himself. By the early 1940s, most African American voters supported Democrats, although at the time many continued to be disenfranchised.

New Dealers

As well as the New Deal Coalition, Roosevelt also attracted a new group of officials who both shaped and supported his agenda. Known as New Dealers, they were academics, politicians, and experts who did not form a unified formal group, but all advised Roosevelt on a **plethora** of issues. Together they formed Roosevelt's Brain Trust, or a body of

advisors. While they represented various approaches to the question of how to end the Great Depression, they all shared the view that the central government not only could but also should shape and oversee reforms and market regulations that would protect the well-being of Americans.



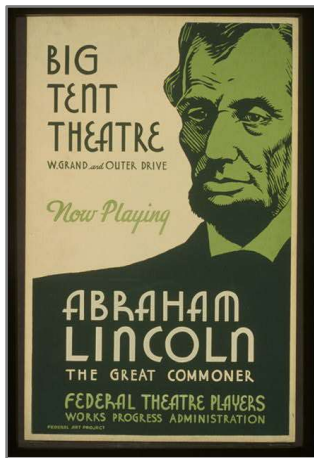
War Production Board poster quoting FDR's Fireside Chat of February 23, 1942. Roosevelt wisely used weekly "Fireside Chats" to keep in touch by radio with his populace.

Monetary Reform

In March and April of 1933, the Roosevelt administration also reformed the monetary system through executive orders and legislation. First, the government suspended the gold standard. The export of gold was banned, except under license from the Treasury. Anyone holding significant amounts of

gold coinage was mandated to exchange it for US dollars at the current exchange rate. Furthermore, the Treasury no longer had to pay gold on demand for the dollar and gold was no longer considered valid legal tender for private and public debts.

These reforms enabled the Federal Reserve to increase the amount of money in circulation needed to level the economy. Markets immediately responded well to the reforms, with people acting on the hope that the decline in prices would finally end.



1936 WPA Poster for a Federal Theatre Project presentation

Agricultural Adjustment Act (1933 and 1938)

One of the main goals of Roosevelt's administration was to control (lower) agricultural production and increase prices. The legislation that aimed to achieve this goal was the 1933 Agricultural Adjustment Act (AAA), one of the New Deal's flagship, but also most controversial, programs. The AAA offered landowners "acreage reduction" contracts in which farmers agreed not to grow certain crops on a portion of their land. In return, they received compensation for what they would have usually gotten from those acres. The money for the subsidies was to be generated from taxes imposed on companies that processed farm products. However, in 1936, the Supreme Court declared the 1933 AAA unconstitutional (the tax levied on processors in order to pay subsidies and regulation of agriculture by the federal government were both deemed unconstitutional). In the aftermath of this decision, the **Agricultural Adjustment Act of 1938** followed. It revived the provisions of its predecessor, but the financing was to come from the federal government and not from a tax imposed on food processors. The legislation helped the agricultural sector to recover, but it

produced disproportional benefits for big farms and food processors. Many small landowners and tenants, particularly sharecroppers, were forced to leave rural areas and seek employment in economically struggling cities.

Relief and Recovery Programs that Benefited Rural Areas

The Civilian Conservation Corps (CCC) provided jobs for young, unmarried, unemployed men. The program focused heavily on the conservation effort. Its main outcomes were reforestation (nearly 3 billion trees planted), creation of more than 800 new parks nationwide and revitalization of most state parks, and the building of a network of service buildings and public roadways in remote areas. While many politicians mocked the program initially, it proved to be one of the most effective and popular efforts of the New Deal.

The Tennessee Valley Authority (TVA) aimed to modernize the poor farms in the Tennessee Valley region by providing navigation, flood control, electricity generation, fertilizer manufacturing, and economic development.

The Farm Security Administration (FSA) aimed to combat poverty in the countryside. Some of the measures employed by FSA included low interest rate loans for farmers, building cooperative farms where the poorest farmers were resettled in order to farm collectively (the government would also buy the sub marginal land from those farmers), and educational aid to rural families.

The Soil Conservation and Domestic Allotment Act allowed the government to pay farmers to reduce production in order to conserve soil and prevent erosion.

The Rural Electrification Administration (REA) provided low-cost federal loans to cooperative electric power companies in order to bring electricity to isolated rural areas. It is estimated that the REA increased the percentage of farms with access to electricity from 10% to around 40%.

The vision and outline of the New Deal's rural programs have greatly shaped the agricultural sector and later rural reform efforts in the United States.

National Industrial Recovery Act

Franklin Delano Roosevelt signed the National Industrial Recovery Act (NIRA), only three months after he took office. It was one of the most prominent and controversial New Deal laws focused on boosting industry. It aimed "to encourage national industrial

recovery, to foster fair competition, and to provide for the construction of certain useful public works.”

Title I of the act was devoted to industrial recovery. First, trade and industrial associations were permitted to seek presidential approval of “codes of fair competition.” The codes would contain production, labor, and trade guidelines for each industry in order to limit competition and encourage cooperation. They could not promote monopolies or create unfair competition for small businesses and were exempt from federal antitrust laws. Second, workers were guaranteed the right to unionize and bargain collectively. Third, Title I provided standards of maximum work hours, minimum wages, and labor conditions that the codes would cover. Title II established the Public Works Administration (PWA), an agency that would create jobs through public works projects. It also provided funding for a series of transportation projects, local initiatives that would battle unemployment through public work projects, and necessary acquisitions of property that would make such projects possible.

NIRA gave the administration the power to develop voluntary agreements with industries regarding work hours, pay rates, and price fixing. The codes of fair competition were to be developed through public hearings.

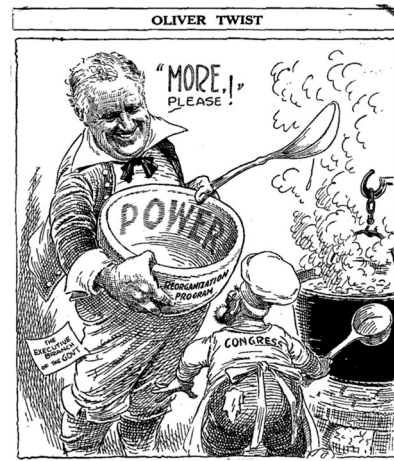
National Recovery Administration

At the center of NIRA was the National Recovery Administration (NRA), headed by Hugh S. Johnson, whom Roosevelt made responsible for industrial recovery. The agency’s main purpose was to plan and introduce regulations that would boost industrial recovery and employment opportunities. The NRA envisioned government experts, business representatives, and workers to write the codes of fair practices that would reduce competition and establish labor and production rules in each industry. Minimum wages, maximum working hours, prices, and production quotas were all to be covered under the codes. These set rules, agreed upon by a coalition of economic actors that would often remain in conflict with each other, were intended to shape the economic recovery by preventing labor disputes, regulating levels of production, preventing further deflation (regulate prices), and establishing fair labor conditions.

Johnson called on every business establishment in the nation to accept a stopgap “blanket code”—a minimum wage of between 20 and 45 cents per hour, a maximum workweek of 35 to 45 hours, and the

abolition of child labor. Together with Roosevelt, he contended that the blanket code would raise consumer purchasing power and increase employment.

Following the provisions of NIRA, NRA engaged in drafting the codes. It approved 557 basic and 189 supplemental industry codes in two years and became notorious for generating large numbers of regulations. Between 4,000 and 5,000 business practices were prohibited, some 3,000 administrative orders running to over 10,000 pages were promulgated, and thousands of opinions and guides from national, regional, and local code boards interpreted and enforced the act.



Oliver Twist, 1937 cartoon by Joseph L. Parrish in the *Chicago Tribune* warning that FDR’s executive branch reorganization plan is a power grab

Criticism

NIRA, and consequently NRA, attracted widespread criticism from business, politics, labor, and intellectuals. While some complained that the federal government was too involved in the regulation of the industry, others pointed out that it was industries that mostly wrote the codes and thus preserved a fair amount of control. Furthermore, employers did not respect NIRA’s labor protection provisions. Higher prices, although welcomed in light of the severe deflation, did not boost the economy as wages remained low and the consumers’ purchasing power did not alter.

In 1935, the US Supreme Court unanimously declared that NIRA was unconstitutional, ruling that it delegated legislative powers to the executive branch and regulated commerce that was not interstate in character. NRA’s role was redefined by executive order. The agency now promoted industrial cooperation and produced economic studies.

Many of NIRA labor provisions reappeared in the National Labor Relations Act (Wagner Act), passed later the same year. The NLRA enabled private sector workers to organize into trade unions, engage in collective bargaining to negotiate the

terms and conditions of their employment without being marginalized or coerced, and take collective action if necessary. In the long term, the act allowed a surge in the growth and power of unions, which became a core part of the New Deal Coalition.



The Meaning of Social Security, mural by Ben Shahn

Lesson Three

History Overview and Assignments Final New Deal Efforts

HISTORIANS DEBATE when the New Deal ended. Some refer to the final stage of the agenda as the Third New Deal. The 1937-38 Recession, for which Roosevelt's opponents blamed the President, resulted in another round of New Deal initiatives. In response to the attacks, Roosevelt moved further left, attacked monopoly power, and drastically increased relief spending. Two main factors had impact on the gradual end of the New Deal: the change in the balance of power in Congress after the 1938 midterm election and the threat of global war.



A farmer and a County Agricultural Conservation Committee representative review the provisions of the Agricultural Adjustment Act (AAA) farm program to determine how it can best be applied on that particular acreage.

Key People, Places, and Events

- Third New Deal
- Recession of 1937-38
- Wagner-Steagall Act
- 1938 Agricultural Adjustment Act
- 1938 Fair Labor Standards Act (FLSA)
- National minimum wage

Suggested Reading and Assignments

- Read the article: *Roosevelt's Second Term, Part One*.
- Narrate about today's reading using the appropriate notebook page. Be sure to include key people, events, and dates within the narration.
- For each heading listed in today's article, create an outline showing the main points made by the author. Use the website found on your **ArtiosHCS** curriculum website for this unit to explore the use of outlines.
- Continue writing your five-paragraph essay evaluating the **benefits and detriments of the New Deal**.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

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Roosevelt's Second Term, Part One

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The Third New Deal

Historians continue to debate when the New Deal ended. While some identify the end of Franklin Delano Roosevelt's unprecedented reform agenda as early as the beginning of his second term (1936–37), others agree that while the number and scale of initiatives introduced during the second term pale in comparison with those passed during Roosevelt's first term, the New Deal eventually and gradually ended in 1938. That was when Republicans recovered from their 1936 devastating loss and recorded substantial gains in Congress in the aftermath of the 1938 midterm election.

On the one hand, the new balance of power in Congress made the passing of new legislation more and more challenging for the Roosevelt administration. On the other, first the threat and then the 1939 outbreak of World War II in Europe shifted Roosevelt's focus from domestic reforms to the war effort long before the US formally joined the war. Although traditionally the New Deal is divided into two stages (First New Deal, 1933–34/5 and Second New Deal 1935–38), some historians refer to the final phase of the New Deal as the "**Third New Deal**." The Third New Deal usually refers to the period around and following the **Recession of 1937–38**, with some pointing to the 1939 Reorganization Act (which allowed the President to reorganize the executive branch) as the end of the final phase of the New Deal.

Roosevelt Recession

Still in the midst of the Great Depression, the US economy entered another period of economic downturn in the spring of 1937, which continued through most of 1938. The Roosevelt administration was under assault, and the President's opponents

even referred to the crisis as the "Roosevelt Recession." While some argued that the downturn was a result of a premature effort to curb government spending and balance the budget, conservatives believed that it was caused by what they saw as Roosevelt's attacks on business and the empowered position of organized labor. In response to this criticism, Roosevelt and his proponents intensified their earlier anti-monopoly efforts and blamed big business for the negative economic trends.

In 1937, Roosevelt appointed an aggressive new director of the Antitrust Division of the Justice Department. However, this effort lost its effectiveness once World War II began, and big business was urgently needed to produce war supplies. The anti-monopoly campaign aimed to hurt big business that Roosevelt and his advisors saw as obstructing economic recovery. However, the Roosevelt administration failed to pass any major trust-busting legislation.



"Rural broadband expansion is the most critical technological infrastructure challenge that this country has faced since the Rural Electrification Act of 1936 was signed into law in 1936," noted Acting Rural Utilities Service (RUS) Administrator Chris McLean.

Roosevelt rejected the advice of his Secretary of Treasury, Henry Morgenthau, to cut spending and

announced more New Deal programs. In the fall of 1937, the Housing Act (known also as the **Wagner-Steagall Act**) introduced government subsidies for local public housing agencies to improve living conditions for low-income families. In February 1938, Congress passed the second **Agricultural Adjustment Act** (AAA), which authorized crop loans, crop insurance against natural disasters, and large subsidies to farmers who cut back production. In April of the same year, the President sent a new large-scale spending bill to Congress, requesting \$3.75 billion for various government projects, including those focused on unemployment relief.

One of the most influential pieces of legislation passed in the final stage of the New Deal was the **1938 Fair Labor Standards Act (FLSA)**. It established a **national minimum wage** (25 cents per hour in the first year after the Act was passed), overtime standards, and prohibited most employment of minors (individuals under the age 16 or 18, depending on the nature of work) in “oppressive child labor.” It also limited the work week to 44 hours (amended to 40 hours a week in 1940). FLSA did not apply to all industries. Historians estimate that the Act’s provisions covered

not more than 20 percent of the labor force. Also, the ban on child labor introduced in FLSA did not cover agriculture, where child labor was rampant. However, FLSA was critical to establishing the labor standards that remain the foundation of labor law in the United States.

The End of the New Deal

Roosevelt intended to introduce more legislation during his second term (1937–1941), but two main factors made this a much more challenging task than during his first term: the lack of political support and the threat of war. The Depression continued with decreasing effect until the United States entered World War II in December 1941. Under the special circumstances of war mobilization, massive war spending doubled the GNP. Civilian unemployment was reduced from 14 percent in 1940 to less than 2 percent by the end of 1943.

Historians and economists disagree on the extent to which the New Deal helped the US economy recover from the Great Depression. However, they all agree that the primary factor of the eventual economic growth that followed the New Deal was driven by the demands of the war effort.

Lesson Four

History Overview and Assignments Eleanor Roosevelt

ELEANOR ROOSEVELT was an active political voice before, during, and after Franklin Delano Roosevelt’s presidency. She developed her own political agenda, often in opposition to her husband’s stance, and became one of the most influential women in the Democratic Party.



Eleanor Roosevelt (1933)

Key People, Places, and Events

Eleanor Roosevelt
National Youth Administration
Mary McLeod Bethune
NAACP
United Nations General Assembly
United Nations Commission on Human Rights
Universal Declaration of Human Rights

Suggested Reading and Assignments

- Read the article: *Roosevelt's Second Term, Part Two*.
- Narrate about today's reading using the appropriate notebook page. Be sure to include key people, events, and dates within the narration.
- For each heading listed in today's article, create an outline showing the main points made by the author. Use the website found on your **ArtiosHCS** curriculum website for this unit to explore the use of outlines.
- Continue writing your five-paragraph essay evaluating the **benefits and detriments of the New Deal**.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

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Roosevelt's Second Term, Part Two

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Eleanor Roosevelt

Anna **Eleanor Roosevelt** (1884–1962) redefined the role of the First Lady of the United States. Her commitment to social justice and strong opinions on a number of issues considered controversial during her time (e.g., race relations, women's rights, etc.) made her one of the most beloved women in American politics for some and one of the most scandalous ones for others, including many among her husband's supporters. She served as the First Lady from 1933 to 1945, developing and pursuing her own active political agenda. However, she was a well-known public life figure before Franklin Delano Roosevelt took over the presidential office and long after her husband's death in 1945.

Born into a wealthy family, Roosevelt followed trends popular among women of her own class. By the end of the 19th century, many progressive middle- and upper-class urban women believed they had a social responsibility to help those in need. She married Franklin, her distant cousin, in 1905, and devoted the first years of their marriage to raising their children (she gave birth to six children, one of whom died as an infant). In 1918, she discovered her husband's extramarital affair, and although the marriage did not end, it also never emotionally recovered, turning into what historians describe as political partnership.

In the 1920s, Eleanor supported a number of women's rights and labor causes. She was active in organizations fighting for minimum wage, maximum working hours, a ban on child labor, and other labor regulations. She also supported women's voting rights and became an influential member of the Democratic Party in New York. Historians credit Eleanor for encouraging and even partly facilitating (through personal support and political activism)

her husband's return to politics after he suffered from polio. When Franklin won governorship of New York in 1928, Eleanor became actively involved in his work, becoming one of the most known women in American politics.

The First Lady

Throughout Franklin's presidency, Eleanor served as a close and influential presidential advisor but also established her own position as a political figure with much more radical views than those of her husband's. She regularly held her own press conferences and maintained a close relationship with the White House female press corp. Her use of popular media to promote the New Deal and her own messages included a newspaper column "My Day" that appeared in newspapers across the country from 1935 until 1962.

She traveled extensively, both internationally and in the United States. The domestic travels helped her better understand the plight of Americans during the Great Depression and allowed her to serve the role of messenger between the people that she met and her husband. On one hand, she assured ordinary Americans that her husband cared for them. On the other, she pushed Franklin to address the needs of those whom he forgot, ignored, or simply refused to support. Eleanor publicly pointed out that the New Deal ignored the interests of women. She also advocated for the needs of young Americans. Her efforts led to creating the **National Youth Administration**, which focused on providing work and education for Americans between the ages of 16 and 25 as part of the 1935 Work Progress Administration.

Unlike her husband, Eleanor was a fervent supporter of civil rights for African Americans. She

advocated for anti-lynching legislation, even when she realized that Franklin would not endorse it for fear of alienating white Southerners in Congress. Her most publicized act of opposition to segregation was when, in 1939, she severed her connection with the Daughters of the American Revolution (DAR), after the organization banned Marian Anderson, an African American opera singer, from performing at Constitution Hall, which the DAR owned in Washington, DC. Instead, she arranged for Anderson to sing on the stairs of the Lincoln Memorial.

While Eleanor supported other struggles of African American communities, this well-known episode demonstrates how different her attitude toward African Americans was from that of her husband's. She was explicit in her support of civil rights, did not hide her agenda from the often-critical public eye, and challenged her husband's political opponents and allies (especially racist white Southerners). Eleanor sought attention for the civil rights cause through relationships and close friendships with African American leaders, most notably **Mary McLeod Bethune**, the founder of the National Council of Negro Women, member of the Black Cabinet, and director of the Division of Negro Affairs at the National Youth Administration; and Walter White, the **NAACP's** executive secretary and anti-lynching legislation activist.



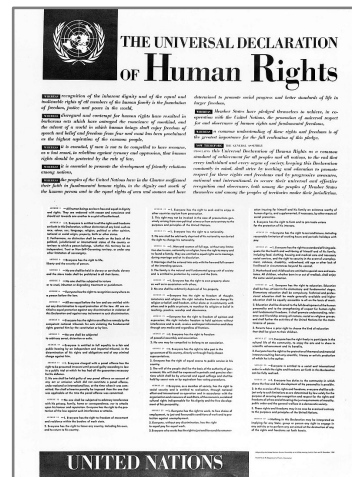
Roosevelt and Mary McLeod Bethune, a member of Franklin D. Roosevelt's Black Cabinet (1943)

During World War II, Eleanor continued to support racial integration in labor force and in the military. While her activism did not result in any sweeping civil rights legislation, historians note that her fight for racial equality had symbolic significance.

Despite the fact that during the post-WWII period, African American leaders accused Eleanor of giving up on the civil rights struggle, she was an

unusual representative of her own class. Analogously, in opposition to her husband's stance, she warned against the prejudice targeted at Japanese Americans in the aftermath of the Pearl Harbor attack. Reportedly, she also privately opposed the internment camps established by the Roosevelt administration.

After her husband's death in 1945, Roosevelt continued to be an international influence as an author, speaker, politician, and activist. She worked to enhance the status of working women, although she criticized and never supported the Equal Rights Amendment. In 1945, President Harry Truman appointed Eleanor to be a delegate to the **United Nations General Assembly** (an organization championed by her husband). She was the chairperson of the **United Nations Commission on Human Rights** and one of the key officials behind the **Universal Declaration of Human Rights**, which was instrumental in the development of international human rights legislation.



The Universal Declaration of Human Rights (1948)

Eleanor Roosevelt also remained an influential figure in the Democratic Party. In 1952 and 1956, she did not endorse Dwight Eisenhower but former Illinois governor Adlai Stevenson as the Democratic presidential candidate. This decision provoked opposition and disappointment among African Americans, as Stevenson was a segregationist and civil rights opponent. She reluctantly endorsed John Kennedy in 1960. Kennedy reappointed her to the US delegation to the United Nations, asked her to serve on the Presidential Advisory Commission for the Peace Corps, and made her chair of the Presidential Commission of the Status of Women.

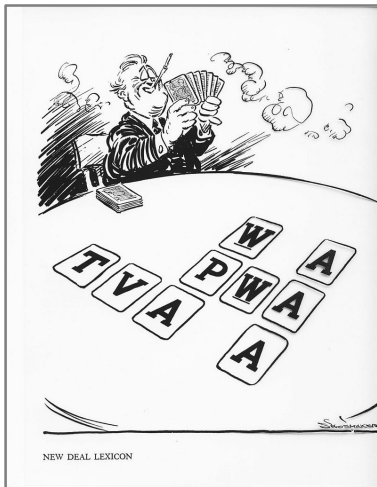
Eleanor Roosevelt died of a rare form of bone tuberculosis in 1962, at the age of 78.

Lesson Five

History Overview and Assignments

Legacy of the New Deal

THE NEW DEAL redefined the role of the government, convincing the majority of ordinary Americans that the government not only could but should intervene in the economy as well as protect and provide direct support for American citizens. In the process of establishing the New Deal legislation, the balance of power between the president and Congress shifted, with the President gaining significant power. The New Deal established a number of welfare state programs and protective policies, with Social Security and labor regulations being its most influential legacies. The New Deal also changed and strengthened the Democratic Party and served as the foundation of an ideology known as New Deal Liberalism, which has remained an important and controversial influence in American politics.



Editorial cartoons parodied the New Deal as Roosevelt's private game with alphabetical agencies.

Suggested Reading and Assignments

- Read the article: *The Legacy of the New Deal*.
- Narrate about today's reading using the appropriate notebook page. Be sure to include key people, events, and dates within the narration.
- For each heading listed in today's article, create an outline showing the main points made by the author. Use the website found on your **ArtiosHCS** curriculum website for this unit to explore the use of outlines.
- Continue writing your five-paragraph essay evaluating the **benefits and detriments of the New Deal**.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

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The Legacy of the New Deal

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Legacy of the New Deal

President Franklin D. Roosevelt had come into office in 1933 amid the economic calamity of the Great Depression, offering the nation a New Deal intended to alleviate economic desperation and joblessness, provide greater opportunities, and restore prosperity. His presidency (1933–1945, the longest in US history) was marked by an increased role the federal government played in addressing the nation's economic and social problems. Work relief programs created jobs, ambitious public works projects promoted economic development, and a federal Social Security system was initiated. However, historians continue to debate the

significance and legacy of the New Deal. William Leuchtenburg, a foremost historian of the era who is considered Roosevelt's "sympathetic critic," called the New Deal a "halfway revolution." He argued that the New Deal did not go far enough in its social or economic reforms because Roosevelt faced too much opposition and was too constrained by political factors to truly achieve a "full" revolution. Consequently, the New Deal was a series of short-term economic initiatives that lacked the long-term vision or planning that was necessary for truly revolutionary changes.

Other historians assess the legacy of the New Deal depending on their own political stand.

Conservatives argued that the New Deal limited big business (and thus economic activities) and, in practice, meant socialism.

New Left historians in the 1960s criticized Roosevelt and the New Deal for not attacking capitalism more vigorously and not helping African Americans achieve equality. They emphasized the absence of a philosophy of reform to explain the failure of New Dealers to attack fundamental social problems. They also detected a remoteness from the people and indifference to participatory democracy and emphasized conflict and exploitation during the era. Regardless of political views, however, historians generally agree that the United States battled the consequences of the Great Depression, not thanks to the New Deal and its relief and reform programs, but thanks to the growth that resulted from the demands of World War II.

New Deal relief programs are generally regarded as a mixed success in ending the nation's economic problems on a macroeconomic level. Although fundamental economic indicators may have remained depressed, the programs were very popular among ordinary Americans. They improved the life of many citizens through providing jobs for the unemployed, legal protection for labor unions and some non-unionized industrial workers, modern utilities for rural America (e.g., electricity), living wages for the working poor, and price stability for farmers. However, the same programs disproportionately benefited white Americans and particularly white males. Economic progress for minorities, especially African Americans and many working-class women, was hindered by discrimination, which the Roosevelt administration rarely battled and often endorsed.

Social Assistance

One of the primary legacies of the New Deal was a change in the relationship between the government and the nation. The New Deal was built around the assumption that the government, both federal and state, not only could but should intervene in and regulate the economy and directly support those in need. Although the idea had emerged in Europe in the 19th century and gained some traction in the United States during the Progressive Era, it was Roosevelt and his New Deal that applied it on such a massive scale.

A number of social assistance programs that exist in the United States today trace their legacy to

the New Deal era, including old age pensions, unemployment insurance, farm subsidies, subsidized public housing, support for the disabled, and support for children in the poorest families. They are designed to subsidize the needs of the general population who meet various eligibility requirements. The Social Security system remains the largest and most prominent social aid program originally established by New Deal legislation. Similarly, measures protecting labor that are today a taken-for-granted aspect of American life are a result of the New Deal. While such developments as a ban on child labor, maximum working hours, and minimum wages had been discussed or even introduced to a limited extent on a state level during the Progressive Era, it was the New Deal legislation that included them in federal legislation.

Political Legacies

Historians agree that the New Deal resulted in critical changes in the US political landscape. Roosevelt's presidency redefined the role of the executive branch, giving much more substantial power to the President and the federal government. Through a large number of federal agencies and programs, the government regulated the economy, including for example, labor relations in some industries, and thus, multiple groups of citizens received legal protection and support. These ideas inspired the next generations of American reformers and paved the way for reform-minded presidents and their ideas, particularly those of President Lyndon B. Johnson and his Great Society agenda (inspired by Johnson's direct participation in the New Deal).

The New Deal also dramatically changed the two main political parties in the United States. Roosevelt's commitment to the improvement of the plight of the working class and the poor shifted political loyalties. Thanks to the New Deal legislation, the urban working class, including labor unions, became one of the most loyal supporters of the Democratic Party. Despite's Roosevelt's questionable record in respect to African Americans, even these voters, who until 1936 loyally supported Lincoln's Party, turned to the Democrats. What was known as the New Deal Coalition turned the Democratic Party into a majority party, and shaped American politics until the 1960s, with some remnants existing into the 1980s.

Lesson Six

History Overview and Assignments Prelude to World War II

AMERICAN PARTICIPATION in World War I convinced many that the long-cherished position of American isolationism should be embraced even more fervently in the world changed by the first global conflict on such a massive scale. However, non-interventionism took a new turn during the Great Depression. President Herbert Hoover repeated the United States' commitment to isolationism while his successor, Democrat Franklin Delano Roosevelt, translated this commitment into a number of foreign policy decisions.



Battleships being dismantled for scrap in Philadelphia Navy Yard, after the Washington Naval Treaty imposed limits on capital ships, US Naval Historical Center. Courtesy of the San Francisco Maritime Museum, San Francisco, California

Suggested Reading and Assignments

- Read the article: *Non-Interventionism*.
- Narrate about today's reading using the appropriate notebook page. Be sure to include key people, events, and dates within the narration.
- For each heading listed in today's article, create an outline showing the main points made by the author. Use the website found on your **ArtiosHCS** curriculum website for this unit to explore the use of outlines.
- Complete your five-paragraph essay evaluating the **benefits and detriments of the New Deal**.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

World Disarmament Conference

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Non-Interventionism

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Attempts at Disarmament

After World War I, many attempts at disarmament, or the reduction or abolition of the military forces and weapons of a nation, had emerged worldwide, such as the Kellogg-Briand

Pact. Historians writing in the 1930s began to emphasize the fast-paced arms race preceding the outbreak of World War I. Additionally, all the major powers, except the US, committed to disarmament in both the Treaty of Versailles and the Covenant of the

League of Nations. Simultaneously, an international nongovernmental campaign to promote disarmament developed throughout the 1920s and early 1930s.

The World Disarmament Conference

Article 8 of the Covenant of the League of Nations gave the League the task of reducing “armaments to the lowest point consistent with national safety and the enforcement by common action of international obligations.” A significant amount of the League of Nations’s time and energy was devoted to this goal, even though many member governments were uncertain that such extensive disarmament could be achieved or was even desirable. The Allied powers were also under obligation by the Treaty of Versailles to attempt to disarm, and the armament restrictions imposed on the defeated countries had been described as the first step toward worldwide disarmament. The League Covenant assigned the league the task of creating a disarmament plan for each state, but the Council devolved this responsibility to a special commission set up in 1926 to prepare for the 1932–34 **World Disarmament Conference**.

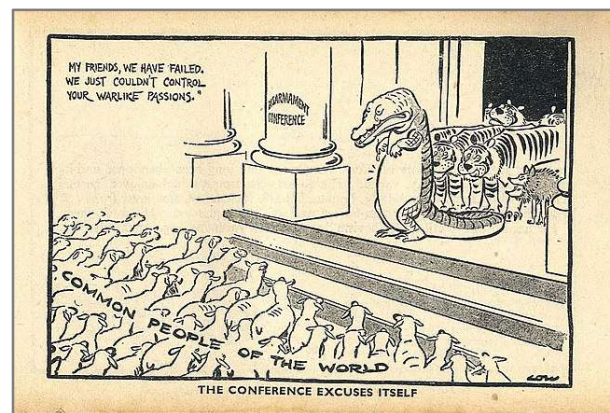
Members of the League of Nations held different views toward the issue. The French were reluctant to reduce their armaments without a guarantee of military help if they were attacked; Poland and Czechoslovakia felt vulnerable to attack from the West and wanted the League’s response to aggression against its members to be strengthened before they disarmed. Without this guarantee, they would not reduce armaments because they felt the risk of attack from Germany was too great.

The World Disarmament Conference was an effort by member states of the League of Nations, together with the US and the Soviet Union, to actualize the ideology of disarmament. It took place in Geneva, with representatives from 60 states, between 1932 and 1934. A one-year moratorium on the expansion of armaments, later extended by a few months, was proposed at the start of the conference. The Disarmament Commission obtained initial agreement from France, Italy, Japan, and Britain to limit the size of their navies. The talks were beset by a number of difficulties from the outset. Among these were disagreements over what constituted “offensive” and “defensive” weapons and the polarization of France and Germany. The

increasingly military-minded German governments could see no reason why their country could not maintain the same level of armaments as other powers, especially France. The French, for their part, were equally insistent that German military inferiority was their only insurance from future conflict as serious as they had endured in the First World War. As for the British and US governments, they were unprepared to offer the additional security commitments that France requested in exchange for limitation of French armaments. The talks broke down and Hitler withdrew Germany from both the Conference and the League of Nations in October 1933.

Ultimate Failure

Ultimately, these disarmament attempts failed to halt the military buildup by Germany, Italy, and Japan during the 1930s. The League of Nations turned out to be ineffective in its efforts to act as an international peacekeeping organization. It was mostly silent in the face of major events leading to the second World War, such as Hitler’s re-militarization of the Rhineland and occupation of the Sudetenland and Anschluss of Austria, which had been forbidden by the Treaty of Versailles. In fact, League members themselves re-armed. In 1933, Japan simply withdrew from the League rather than submit to its judgment, as did Germany (using the failure of the World Disarmament Conference to agree to arms parity between France and Germany as a pretext) and Italy in 1937. The final significant act of the League of Nations was to expel the Soviet Union in December 1939, after it invaded Finland. Thus, all agreements and disarmament attempts failed.



Caricature on the ending of the Conference in Europe

The Artios Home Companion Series

Unit 19: World War II Begins

Teacher Overview

FOR THE SECOND TIME in the 20th century, the world became embroiled in a devastating conflict. World War II was fought over differences left unresolved after World War I. Twelve million victims perished from Nazi atrocities in the Holocaust, and over 400,000 Americans were killed during the four years of US involvement, an American death rate second only to the Civil War.



Hitler announcing the declaration of war against the United States to the Reichstag on 11 December 1941
Bundesarchiv, Bild 183-1987-0703-507 / unbekannt / CC-by-SA 3.0

Suggested Assignments

In this unit, students will:

- Complete six lessons in which they will learn about **World War II through the Tehran Conference**, journaling and answering discussion questions as they read.
- Define vocabulary words.
- Create a **timeline** beginning with this unit, complete with pictures that they find online, that records events and policies leading up to and during World War II. *This will be due at the end of Unit 20.*
- Conduct research on one of the following topics and prepare to share:
 - The German propaganda machine
 - The world's knowledge of Hitler's atrocities against the Jews
 - Christian resistance to the wartime atrocities
 - Another approved topic pertinent to World War II
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

The Bible talks about our need to make ourselves ready for spiritual warfare, like the world's nations took steps to prepare to enter World War II.

Put on the whole armor of God, that you may be able to stand against the schemes of the devil. For we do not wrestle against flesh and blood, but against the rulers, against the authorities, against the cosmic powers over this present darkness, against the spiritual forces of evil in the heavenly places. Therefore take up the whole armor of God, that you may be able to withstand in the evil day, and having done all, to stand firm. Stand therefore, having fastened on the belt of truth, and having put on the breastplate of righteousness, and, as shoes for your feet, having put on the readiness given by the gospel of peace. In all circumstances take up the shield of faith, with which you can extinguish all the flaming darts of the evil one; and take the helmet of salvation, and the sword of the Spirit, which is the word of God.

– Ephesians 6:11-17

God's Word tells us there will be times for both war and peace.

A time to love, and a time to hate; a time for war, and a time for peace.

– Ecclesiastes 3:8

“The only thing necessary for the triumph of evil is for good men to do nothing.” – Edmund Burke

When the righteous increase, the people rejoice: but when the wicked rule, the people groan.

– Proverbs 29:2

Lesson One

History Overview and Assignments Hitler's Germany and the Axis Powers

THE GERMAN ECONOMY had suffered severe setbacks after the end of World War I, partly because of reparations payments required under the 1919 Treaty of Versailles. These setbacks created social unrest and provided an opportunity for the Nazi Party to attract popularity. Racism, especially antisemitism, was a central feature of the Nazi Party. After the Nazi Party won a majority of seats in the German parliament, Adolf Hitler was appointed Chancellor of Germany by the President of the Weimar Republic, and soon eliminated all political opposition and consolidated his power. Italian fascism under Benito Mussolini was rooted in Italian nationalism and the desire to restore and expand Italian territories. Pre-WWII Japan was characterized by political totalitarianism, ultranationalism, expansionism, and fascism culminating in Japan's invasion of China in 1937.



Red Army artillery unit during the Battle of Lake Khasan (1938)
Photo by Viktor Antonovich Tyomin

Key People, Places, and Events

Adolf Hitler
Nazi Party
Third Reich
Reichstag
Reichstag Fire Decree
Enabling Act
Benito Mussolini
Pact of Steel
Shōwa period
Manchurian Incident of 1931
Second Sino-Japanese War
Nanking Massacre
Hirohito
Tripartite Pact

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article: *Axis Powers*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary word in the context of the reading. Write the word and its definition in the vocabulary section of your history notebook.
- Begin a **timeline**, complete with pictures that you find online, that record events and policies leading up to and during World War II. *This will be due at the end of Unit 20.*
- Begin conducting research on one of the following topics and prepare to share:
 - The German propaganda machine
 - The world's knowledge of Hitler's atrocities against the Jews
 - Christian resistance to the wartime atrocities
 - Another approved topic pertinent to World War II
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Vocabulary

pragmatism

Discussion Questions

1. List the similarities between Hitler and Mussolini's rises to power.
2. What fundamental American Constitutional principles need to be protected in order to prevent a similar takeover in the US? Be specific.
3. What measures did Hitler and Mussolini employ to expand and maintain control over the populace?
4. Why did Mussolini prefer to ally with Germany rather than with Britain or France? What role did Social Darwinism play in this preference?
5. What was Japan's stated objective in the Second Sino-Japanese War?
6. What nations were allied by means of the Tripartite Pact?
7. Why did Japan ally itself with Germany and Italy?

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Axis Powers

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NAZI GERMANY

Nazi Germany is the common English name for the period in German history from 1933 to 1945 when the country was governed by a dictatorship under the control of **Adolf Hitler** and the **Nazi Party**. Under Hitler's rule, Germany was transformed into a fascist totalitarian state that controlled nearly all aspects of life. The period is also known as the **Third Reich**, the name meaning "Third empire," following the Holy Roman and German Empires, and Hitler expected it to last for a thousand years. The Nazi regime came to an end, however, after the Allied Forces defeated Germany in May 1945, ending World War II in Europe.

The Rise of the Nazi Party

The German economy had suffered severe setbacks after the end of World War I, partly because of reparations payments required under the 1919 Treaty of Versailles. The government printed money to make the payments and repay the country's war debt; the resulting hyperinflation led to higher prices for consumer goods, economic chaos, and food riots. When the government failed to make the reparations payments in January 1923, French troops occupied German industrial areas along the Ruhr River. Widespread civil unrest followed.

The National Socialist German Workers' Party (Nazi Party) was the renamed successor of the German Workers' Party founded in 1919, one of several political parties active in Germany at the time. The party platform included removal of the Weimar Republic, rejection of the terms of the Treaty of Versailles, radical antisemitism, and anti-Bolshevism. They promised a strong central

government, increased *Lebensraum* (living space) for Germanic peoples, formation of a national community based on race, and racial cleansing via the active suppression of Jews, who would be stripped of their citizenship and civil rights. The Nazis proposed national and cultural renewal based upon the *Völkisch* (German populist) movement.

When the stock market in the United States crashed on October 24, 1929, the effect on Germany was dire. Millions were thrown out of work, and several major banks collapsed. Hitler and the Nazi Party prepared to take advantage of the emergency to gain support for their party. They promised to strengthen the economy and provide jobs. Many voters decided the Nazi Party was capable of restoring order, quelling civil unrest, and improving Germany's international reputation. After the federal election of 1932, the Nazis were the largest party in the **Reichstag** (elected parliament), holding 230 seats with 37.4 percent of the popular vote.

Hitler Seizes Power

Although the Nazis won the greatest share of the popular vote in the two Reichstag general elections of 1932, they did not have a majority, so Hitler led a short-lived coalition government formed by the Nazi Party and the German National People's Party. Under pressure from politicians, industrialists, and the business community, President von Hindenburg appointed Hitler as Chancellor of Germany on January 30, 1933. In the following months, the Nazi Party rapidly brought all aspects of life under control of the party. All civilian organizations, including agricultural groups, volunteer organizations, and sports clubs, had their leadership replaced with Nazi sympathizers or party members. By June 1933,

virtually the only organizations not under control of the Nazi Party were the army and the churches.

On the night of February 27, 1933, the Reichstag building was set afire, and a Dutch Communist was found guilty of starting the blaze. Hitler proclaimed that the arson marked the start of a Communist uprising. Violent suppression of Communists was undertaken all over the country, and 4,000 members of the Communist Party of Germany were arrested. The **Reichstag Fire Decree**, imposed on February 28, 1933, rescinded most German civil liberties, including rights of assembly and freedom of the press. The decree also allowed the police to detain people indefinitely without charges or a court order. The legislation was accompanied by a propaganda blitz that led to public support for the measure.

In March 1933, the **Enabling Act**, an amendment to the Weimar Constitution, passed in the Reichstag by a vote of 444 to 94. This amendment allowed Hitler and his cabinet to pass laws—even laws that violated the constitution—without the consent of the president or the Reichstag. As the bill required a two-thirds majority to pass, the Nazis used the provisions of the Reichstag Fire Decree to keep several Social Democratic deputies from attending; the Communists had already been banned. On May 10, the government seized the assets of the Social Democrats; they were banned in June. The remaining political parties were dissolved, and on July 14, 1933, Germany became a *de facto* one-party state when the founding of new parties was made illegal. Further elections from 1933 to 1938 were entirely Nazi-controlled and saw only the Nazis and a small number of independents elected. The regional state parliaments and the federal upper house were abolished.

On 2 August 1934, President von Hindenburg died. The previous day, the cabinet had enacted a law which stated that upon Hindenburg's death, the office of president would be abolished, and its powers merged with those of the chancellor. Hitler thus became head of state as well as head of government. He was formally named *Führer und Reichskanzler* (leader and chancellor). Germany was now a totalitarian state with Hitler at its head. As head of state, Hitler became Supreme Commander of the armed forces. The new law altered the traditional loyalty oath of servicemen so that they affirmed loyalty to Hitler personally rather than the office of supreme commander or the state. On August 19, the

merger of the presidency with the chancellorship was approved by 90 percent of the electorate.

ITALY UNDER MUSSOLINI

Italian Fascism under **Benito Mussolini** was rooted in Italian nationalism and the desire to restore and expand Italian territories. The socialist agitations that followed the devastation of World War I, inspired by the Russian Revolution, led to counter-revolution and repression throughout Italy. The liberal establishment, fearing a Soviet-style revolution, started to endorse the small National Fascist Party led by Benito Mussolini.

Mussolini's Rise to Power

The *Fascisti*, led by one of Mussolini's close confidants, formed armed squads of war veterans called Blackshirts (or *squadristi*) with the goal of restoring order to the streets of Italy with a strong hand. The fascist Blackshirts clashed with communists, socialists, and anarchists at parades and demonstrations; all of these factions were also involved in clashes against each other. The Italian government rarely interfered with the Blackshirts' actions, owing in part to a looming threat and widespread fear of a Communist revolution. The Fascisti grew rapidly, within two years transforming themselves into the National Fascist Party at a congress in Rome. In 1921 Mussolini won election to the Chamber of Deputies for the first time.

In the night between October 27-28, 1922, about 30,000 fascist Blackshirts gathered in Rome to demand the resignation of liberal Prime Minister Luigi Facta and the appointment of a new fascist government. This event is known as the "March on Rome." On the morning of October 28, King Victor Emmanuel III, who according to the Albertine Statute held the supreme military power, refused the government's request to declare martial law, leading to Facta's resignation. The King then handed over power to Mussolini by asking him to form a new government. The King's controversial decision has been explained by historians as a combination of delusions and fears; Mussolini enjoyed a wide support in the military and among the industrial and agrarian elites, while the King and the conservative establishment were afraid of a possible civil war and ultimately thought they could use Mussolini to restore law and order in the country but failed to foresee the danger of a totalitarian evolution.

The first years of Mussolini's rule as Prime Minister were characterized by a right-wing coalition government composed of fascists, nationalists, liberals, and two Catholic clerics from the Popular Party. The fascists made up a small minority in his original governments. Mussolini's domestic goal was the eventual establishment of a totalitarian state with himself as supreme leader (*Il Duce*), a message that was articulated by the fascist newspaper *Il Popolo*, now edited by Mussolini's brother, Arnaldo. To that end, Mussolini obtained from the legislature dictatorial powers for one year. He favored the complete restoration of state authority with the integration of the *Fasci di Combattimento* into the armed forces, and the progressive identification of the party with the state. In political and social economy, he passed legislation that favored the wealthy industrial and agrarian classes.

Between 1925 and 1927, Mussolini progressively dismantled virtually all constitutional and conventional restraints on his power, thereby building a police state. A law passed on Christmas Eve 1925 changed Mussolini's formal title from "president of the Council of Ministers" to "head of the government." Thereafter he began styling himself as *Il Duce* (the leader). He was no longer responsible to Parliament and could be removed only by the King. While the Italian constitution stated that ministers were responsible only to the sovereign, in practice it had become all but impossible to govern against the express will of Parliament. The Christmas Eve law ended this practice, and also made Mussolini the only person competent to determine the body's agenda. This law transformed Mussolini's government into a de facto legal dictatorship. Local autonomy was abolished, and *podestàs* appointed by the Italian Senate replaced elected mayors and councils.

Fascist Italy

Mussolini's foremost priority was the subjugation of the minds of the Italian people and the use of propaganda to do so. A lavish cult of personality centered on the figure of Mussolini was promoted by the regime.

Mussolini promoted a cult of personality that attributed to him quasi-divine capacities. At various times after 1922, Mussolini personally took over the ministries of the interior, foreign affairs, colonies, corporations, defense, and public works. Sometimes he held as many as seven departments

simultaneously as well as the premiership. He was also head of the all-powerful Fascist Party and the armed local Blackshirts, who terrorized emerging resistance efforts in the cities and provinces. He would later form an institutionalized secret police that carried official state support. He thus succeeded in keeping power in his own hands and preventing the emergence of any rival.

All teachers in schools and universities had to swear an oath to defend the fascist regime. Newspaper editors were all personally chosen by Mussolini, and no one without a certificate of approval from the Fascist Party could practice journalism. These certificates were issued in secret; Mussolini thus skillfully created the illusion of a "free press." The trade unions were also deprived of independence and integrated into what was called the "corporative" system. The aim (never completely achieved), inspired by medieval guilds, was to place all Italians in various professional organizations or corporations under clandestine governmental control.

In his early years in power, Mussolini operated as a **pragmatic** statesman, trying to achieve advantages but never at the risk of war with Britain and France. In a secret speech to the Italian military leadership in January 1925, Mussolini argued that Italy needed to win *spazio vitale* (vital space), and as such his ultimate goal was to join "the two shores of the Mediterranean and of the Indian Ocean into a single Italian territory."

Path to War

By the late 1930s, Mussolini's obsession with demography led him to conclude that Britain and France were finished as powers, and that Germany and Italy were destined to rule Europe if for no other reason than their demographic strength. Mussolini stated his belief that declining birth rates in France were "absolutely horrifying" and that the British Empire was doomed because a quarter of the British population was older than 50. Mussolini believed that an alliance with Germany was preferable to an alignment with Britain and France, as it was better to be allied with the strong instead of the weak. Mussolini saw international relations as a Social Darwinian struggle between "virile" nations with high birth rates that were destined to destroy *effete* nations with low birth rates. Such was the extent of Mussolini's belief that it was Italy's destiny to rule the Mediterranean because of the country's high

birth rate that he neglected much of the serious planning and preparations necessary for a war with the Western powers.

On October 25, 1936, Mussolini agreed to form a Rome-Berlin Axis, sanctioned by a cooperation agreement with Nazi Germany and signed in Berlin. At the Munich Conference in September 1938, Mussolini continued to pose as a moderate working for European peace while helping Nazi Germany annex the Sudetenland. The 1936 Axis agreement with Germany was strengthened by an agreement called the **Pact of Steel** signed on May 22, 1939, which bound fascist Italy and Nazi Germany in a full military alliance.

JAPANESE EXPANSION

During the early **Shōwa period**, Japan moved into political totalitarianism, ultranationalism, and fascism, as well as a series of expansionist wars culminating in Japan's invasion of China in 1937.

The rise of Japanese nationalism paralleled the growth of nationalism in the West. During the **Manchurian Incident of 1931**, radical army officers bombed a portion of the South Manchuria Railroad and, falsely attributing the attack to the Chinese, invaded Manchuria.

Japan's expansionist ambitions led to the outbreak of the **Second Sino-Japanese War** in

1937. After their victory in the Chinese capital, the Japanese military committed the infamous **Nanking Massacre**, also known as the Rape of Nanking, which involved a massive number of civilian deaths including infants and elderly and the large-scale rape of Chinese women.

The Japanese military failed to defeat the Chinese government, and the war descended into a bloody stalemate that lasted until 1945. Japan's stated war aim was to establish the Greater East Asia Co-Prosperity Sphere, a vast pan-Asian union under Japanese domination. Emperor **Hirohito's** role in Japan's foreign wars remains a subject of dispute, with various historians portraying him as either a powerless figurehead or an enabler and supporter of Japanese militarism.

The United States opposed Japan's invasion of China and responded with increasingly stringent economic sanctions intended to deprive Japan of the resources to continue its war in China. Japan reacted by forging an alliance with Germany and Italy in 1940, known as the **Tripartite Pact**, which worsened its relations with the US. In July 1941, the US, Great Britain, and the Netherlands froze all Japanese assets when Japan completed its invasion of French Indochina by occupying the southern half of the country, further increasing tension in the Pacific.

Lesson Two

History Overview and Assignments The Allied Powers

DURING STALIN'S totalitarian rule of the Soviet Union, he transformed the state through aggressive economic planning, the development of a cult of personality around himself, and the violent repression of so-called "enemies of the working class," overseeing the murder of millions of Soviet citizens. During the interwar period, war-torn France collected reparations from Germany, in some cases through occupation, suffered social upheaval and the consequent rise of socialism, and promoted defensive foreign policies. Vivid memories of the horrors and deaths of the World War made Britain and its leaders strongly inclined to pacifism in the interwar era, exemplified by their policy of appeasement toward Nazi Germany. This attempt at pacification paved the way instead to the German annexation of Austria and parts of Czechoslovakia. As Europe moved closer to war in the late 1930s, the United States Congress continued to demand American neutrality, but President Roosevelt and the American public began to support war with Nazi Germany by 1941.

Suggested Reading and Assignments

- Review the discussion questions, then read the article: *The Allied Powers*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.

- Continue adding to your **timeline**, complete with pictures that you find online, recording the events leading up to and during World War II.
- Continue researching the **topic you chose** in Lesson One. Prepare to share your findings.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.



Wartime poster for the United Nations, created in 1941 by the US Office of War Information

Key People, Places, and Events

Joseph Stalin
 Great Purge
 Molotov-Ribbentrop Pact
 Soviet-Japanese Neutrality Pact
 Aristide Briand
 Maginot Line
 Leon Blum
 Popular Front
 Spanish Civil War
 Francisco Franco
 Neville Chamberlain
 Anschluss of March 1938
 Sudetenland
 Munich Agreement
 Neutrality Acts

Vocabulary

collectivization
 grandiloquent

sanction
 ineffectual

acquiesce
 semantic

Discussion Questions

1. Outline Joseph Stalin's rise to power in Soviet Russia.
2. Describe Stalin's leadership and means of maintaining power.
3. Describe the measures taken by the Popular Front in France to address the country's economic distress. Were they effective?
4. Why was France reluctant to declare war against Germany and Italy?
5. Describe Neville Chamberlain's policy of appeasement. Was it effective?
6. What was the Anschluss of March 1938? How did it pave the way for further German expansion?
7. Trace the shift in American policy from one of non-intervention to one of involvement in World War II.

Adapted for High School from:

Boundless World History

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The Allied Powers

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RISE OF STALIN IN SOVIET RUSSIA

From its creation, the government in the Soviet Union was based on the one-party rule of the Communist Party (Bolsheviks). The stated purpose of the one-party state was to ensure that capitalist exploitation would not return to the Soviet Union and that the principles of democratic centralism would be effective in representing the people's will in

a practical manner. Debate over the future of the economy provided the background for a power struggle in the years after Vladimir Lenin's death in 1924. Initially, Lenin was to be replaced by a *troika* ("collective leadership") consisting of Grigory Zinoviev of Ukraine, Lev Kamenev of Russia, and **Joseph Stalin** of the Transcaucasian SFSR (Soviet Federative Socialist Republic).

On April 3, 1922, Stalin was named the General

Secretary of the Communist Party of the Soviet Union. Lenin had appointed Stalin the head of the Workers' and Peasants' Inspectorate, which gave Stalin considerable power. By gradually consolidating his influence and isolating and outmaneuvering his rivals within the party, Stalin became the undisputed leader of the Soviet Union and by the end of the 1920s had established totalitarian rule. In October 1927, Grigory Zinoviev and Leon Trotsky were expelled from the Central Committee and forced into exile.

In 1928, Stalin introduced the First Five-Year Plan for building a socialist economy. In place of the internationalism expressed by Lenin throughout the Revolution, it aimed to build Socialism in One Country. In industry, the state assumed control over all existing enterprises and undertook an intensive program of industrialization. In agriculture, rather than adhering to the "lead by example" policy advocated by Lenin, forced **collectivization** of farms was implemented all over the country. This was intended to increase agricultural output from large-scale mechanized farms, bring the peasantry under more direct political control, and make tax collection more efficient. Collectivization brought social change on a scale not seen since the abolition of serfdom in 1861 and alienation from control of the land and its produce. Collectivization also meant a drastic drop in living standards for many peasants, leading to violent reactions.

Purges and Executions

From collectivization, famines ensued, causing millions of deaths; surviving *kulaks* (Russian peasants with enough wealth to own a farm and hire labor) were persecuted and many sent to *gulags* (political labor camps) where they were forced to perform hard labor.

Social upheaval continued in the mid-1930s. Stalin's **Great Purge** resulted in the execution or detainment of many "Old Bolsheviks" who had participated in the October Revolution with Lenin. During the Great Purge, Lenin undertook a massive campaign of repression of the party, government, armed forces, and intelligentsia, in which millions of so-called "enemies of the working class" were imprisoned, exiled, or executed, often without due process. Major figures in the Communist Party and government, and many Red Army high commanders, were killed after being convicted of treason in show trials. According to declassified Soviet archives, in 1937 and 1938, the Soviet secret police arrested more

than 1.5 million people, of whom 681,692 were shot. Over those two years, that averages to over 1,000 executions a day. According to historian Geoffrey Hosking, "Excess deaths during the 1930s as a whole were in the range of 10–11 million."

Cult of Personality

Cults of personality developed in the Soviet Union around both Stalin and Lenin. Numerous towns, villages and cities were renamed after the Soviet leader, and the Stalin Prize and Stalin Peace Prize were named in his honor. He accepted **grandiloquent** titles (e.g., "Coryphaeus of Science," "Father of Nations," "Brilliant Genius of Humanity," "Great Architect of Communism," "Gardener of Human Happiness," and others), and helped rewrite Soviet history to provide himself a more significant role in the revolution of 1917. At the same time, according to Nikita Khrushchev (who became the first secretary of the Communist Party of the Soviet Union in 1953) Stalin insisted that he be remembered for "the extraordinary modesty characteristic of truly great people." Although statues of Stalin depict him at a height and build approximating the very tall Czar Alexander III, sources suggest he was approximately 5 feet 4 inches.

The early 1930s saw closer cooperation between the West and the USSR. From 1932 to 1934, the Soviet Union participated in the World Disarmament Conference. In 1933, diplomatic relations between the United States and the USSR were established when in November, newly elected President of the United States Franklin D. Roosevelt chose to formally recognize Stalin's Communist government and negotiated a new trade agreement between the two nations. In September 1934, the Soviet Union joined the League of Nations.

In December 1936, Stalin unveiled a new Soviet Constitution. This document was seen as a personal triumph for Stalin, who on this occasion was described by *Pravda* (the official newspaper of the Russian Communist Party) as a "genius of the new world, the wisest man of the epoch, the great leader of communism." By contrast, Western historians and historians from former Soviet-occupied countries have viewed the constitution as a meaningless propaganda document.

The late 1930s saw a shift toward the Axis powers. In 1939, almost a year after the United Kingdom and France concluded the **Munich Agreement** with Germany, the USSR dealt with the Nazis both militarily and economically during

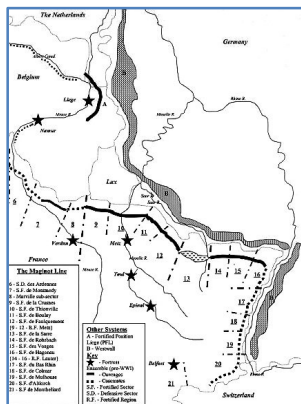
extensive talks. The two countries concluded the **Molotov-Ribbentrop Pact** of non-aggression and the German-Soviet Commercial Agreement in August 1939. The nonaggression pact made possible Soviet occupation of Lithuania, Latvia, Estonia, Bessarabia, northern Bukovina, and eastern Poland. In late November of the same year, unable to coerce the Republic of Finland by diplomatic means into moving its border 16 miles back from Leningrad, Stalin ordered the invasion of Finland.

In the east, the Soviet military won several decisive victories in border clashes with the Empire of Japan in 1938 and 1939. However, in April 1941 USSR signed the **Soviet-Japanese Neutrality Pact** with the Empire of Japan, recognizing the territorial integrity of Manchukuo, a Japanese puppet state.

FRANCE

France had regained Alsace-Lorraine after World War I and occupied the German industrial Saar Basin, a coal and steel region. The German African colonies were put under League of Nations mandates to be administered by France and other victors. From the remains of the Ottoman Empire, France had acquired the Mandate of Syria and the Mandate of Lebanon.

France was part of the Allied force that occupied the Rhineland following the Armistice. From 1925 until his death in 1932, **Aristide Briand**, as prime minister during five short intervals, directed French foreign policy, using his diplomatic skills and sense of timing to forge friendly relations with Weimar Germany as the basis of a genuine peace within the framework of the League of Nations. He realized France could neither contain the much larger Germany by itself nor secure effective support from Britain or the League.



The principal fortified section of the Maginot Line

As a response to the failure of the Weimar Republic to pay reparations in the aftermath of World War I, France occupied the industrial region of the Ruhr to ensure repayments from Germany. The intervention was a failure, and France accepted the American solution to the reparations issues expressed in the Dawes Plan and the Young Plan.

In the 1920s, France established an elaborate system of border defenses called the **Maginot Line**, designed to fight off any German attack. Military alliances were signed with weak powers in 1920–21, called the “Little Entente.”

Great Depression and Social Upheaval

The worldwide financial crisis affected France a bit later than other countries, hitting around 1931. The French depression was relatively mild: unemployment peaked under 5% and the fall in production was at most 20% below the 1929 output; there was no banking crisis.

In contrast to the mild economic upheaval, though, the political upheaval was enormous. After 1931, rising unemployment and political unrest led to the February 6, 1934, riots. Socialist **Leon Blum**, leading the **Popular Front**, brought together Socialists and Radicals to become Prime Minister from 1936 to 1937; he was the first Jew and the first Socialist to lead France. The Communists in the Chamber of Deputies (parliament) voted to keep the government in power and generally supported its economic policies but rejected its foreign policies. The Popular Front passed numerous labor reforms, which increased wages, cut working hours to 40 hours with overtime illegal, and provided many lesser benefits to the working class, such as mandatory two-week paid vacations. However, renewed inflation canceled the gains in wage rates, unemployment did not fall, and economic recovery was very slow. Historians agree that the Popular Front was a failure in terms of economics, foreign policy, and long-term stability.

At first the Popular Front created enormous excitement and expectations on the left—including large-scale sitdown strikes—but in the end it failed to live up to its promise. In the long run, however, later Socialists took inspiration from the attempts of the Popular Front to set up a welfare state.

Foreign Relations

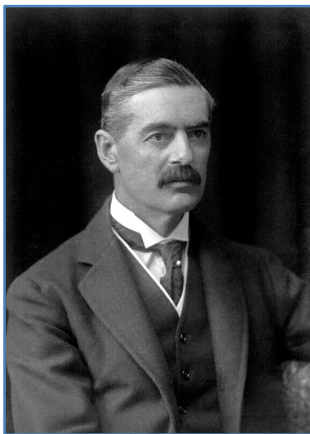
The government joined Britain in establishing an arms embargo during the **Spanish Civil War** (1936–39), in which Nationalists under **Francisco**

Franco overturned the Republican Spanish government. Blum rejected support for the Spanish Republicans because of his fear that civil war might spread to deeply divided France. Financial support in military cooperation with Poland was also a policy. The government nationalized arms suppliers and dramatically increased its program of rearming the French military in a last-minute catch-up with the Germans.

Appeasement of Germany in cooperation with Britain was the policy after 1936, as France sought peace even in the face of Hitler's escalating demands. Prime Minister Édouard Daladier refused to go to war against Germany and Italy without British support, as Neville Chamberlain wanted to save peace at Munich in 1938.

BRITAIN'S POLICY OF APPEASEMENT

World War I was won by Britain and its allies at a terrible human and financial cost, creating a sentiment that wars should be avoided at all costs. The League of Nations was founded with the idea that nations could resolve their differences peacefully. As with many in Europe who had witnessed the horrors of the First World War and its aftermath, United Kingdom's Prime Minister **Neville Chamberlain** was committed to peace. The theory was that dictatorships arose where peoples had grievances, and that by removing the source of these grievances, the dictatorship would become less aggressive. His attempts to deal with Nazi Germany through diplomatic channels and quell any sign of dissent from within, particularly from Churchill, were called by Chamberlain "the general policy of appeasement."



British Prime Minister Neville Chamberlain, who declared the Munich Agreement of 1938 would provide "peace for our time," a phrase remembered for its bitter irony after Hitler invaded Poland the following year

Chamberlain's policy of appeasement emerged from the failures of the League of Nations and of collective security. Members of the League were entitled to assist other members if they came under attack. The policy of collective security ran in parallel with measures to achieve international disarmament and where possible was based on economic **sanctions** against an aggressor. It appeared **ineffectual** when confronted by the aggression of dictators, notably Germany's Remilitarization of the Rhineland and Italian leader Benito Mussolini's invasion of Abyssinia.

Anschluss

The first European crisis of Chamberlain's premiership was over the German annexation of Austria. The Nazi regime was already behind the assassination of Austrian Chancellor Engelbert Dollfuss in 1934 and was now pressuring Chancellor Kurt Schuschnigg. Informed of Germany's objectives, Chamberlain's government decided it was unable to stop these events and **acquiesced** to what later became known as the **Anschluss of March 1938** (the term *Anschluss* means "joining" or "political union"). Although the victorious Allies of World War I had prohibited the union of Austria and Germany, their reaction to the Anschluss was mild. Even the strongest voices against annexation, those of fascist Italy, France, and Britain, were not backed by force. In the House of Commons Chamberlain said, "The hard fact is that nothing could have arrested what has actually happened [in Austria] unless this country and other countries had been prepared to use force." The American reaction was similar. The international reaction to the events of March 12, 1938, led Hitler to conclude that he could use even more aggressive tactics in his plan to expand the Third Reich. The Anschluss paved the way for Munich in September 1938 because it indicated the likely non-response of Britain and France to future German aggression.

Immediately after the Anschluss, Vienna's Jews were forced to wash pro-independence slogans from the city's pavements.

Sudetenland Crisis and the Munich Agreement

The second crisis arose over the **Sudetenland** area of Czechoslovakia, home to a large ethnic German minority. Under the guise of seeking self-determination for the Sudeten Germans, Hitler planned to launch a war of aggression on October 1,

1938. In an effort to defuse the looming crisis, Chamberlain followed a strategy of pressuring Prague to make concessions to the ethnic Germans while warning Berlin about the dangers of war.

Out of these attitudes grew what is known as the Munich Agreement, signed on September 30, 1938, a settlement permitting Nazi Germany's annexation of portions of Czechoslovakia along the country's borders mainly inhabited by German speakers. The agreement was signed by Germany, France, the United Kingdom, and Italy. Sudetenland was of immense strategic importance to Czechoslovakia, as most of its border defenses and banks were situated there along with heavy industrial districts. Because the state of Czechoslovakia was not invited to the conference, it considered itself betrayed and refers to this agreement as the "Munich Betrayal."

Czechoslovakia was informed by Britain and France that it could either resist Nazi Germany alone or submit to the prescribed annexations. The Czechoslovak government, realizing the hopelessness of fighting the Nazis alone, reluctantly capitulated and agreed to abide by the agreement. The settlement gave Germany the Sudetenland starting October 10 and de facto control over the rest of Czechoslovakia as long as Hitler promised to go no further. On September 30 after some rest, Chamberlain went to Hitler and asked him to sign a peace treaty between the United Kingdom and Germany. After Hitler's interpreter translated it for him, he happily agreed.

AMERICAN NON-INTERVENTIONIST POLICY

In the wake of the First World War, non-interventionist tendencies of US foreign policy gained ascendancy. While some of the sentiment was grounded in adherence to Constitutional principles, some bore a reassertion of nativist and inward-looking policy.

Although the US was unwilling to commit to the League of Nations, they continued to engage in international negotiations and treaties, such as signing the Kellogg-Briand Pact. However, this pact, designed to outlaw war and show the US commitment to international peace, had its **semantic** flaws. For example, it did not hold the US to the conditions of any existing treaties, it still allowed European nations the right to self-defense, and it stated that if one nation broke the Pact, it would be up to the other signatories to enforce it. The

Kellogg-Briand Pact was more a sign of good intentions on the part of the US than a legitimate step towards the sustenance of world peace.

The economic depression that followed the Crash of 1929 also encouraged non-intervention. The US focused mostly on addressing the problems of the national economy while the rise of aggressive expansionism policies by fascist Italy and the Empire of Japan led to conflicts such as the Italian conquest of Ethiopia and the Japanese invasion of Manchuria. These events led to ineffectual condemnations by the League of Nations, while official American response was muted. America also did not take sides in the brutal Spanish Civil War.

As Europe moved closer to war in the late 1930s, the US Congress continued to demand American neutrality. Between 1936 and 1937, much to the dismay of President Roosevelt, Congress passed the **Neutrality Acts**, designed to avoid American entanglement in foreign conflicts.

In an address to the American people two days after Germany's invasion of Poland in 1939, President Roosevelt assured Americans that he would do all he could to keep them out of war. However, his words showed his true goals. "When peace has been broken anywhere, the peace of all countries everywhere is in danger," he said.

The war in Europe split the American people into two camps: non-interventionists and interventionists. By the summer of 1940, France had suffered a stunning defeat by Germans, and Britain was the only democratic enemy of Germany. As 1940 became 1941, the actions of the Roosevelt administration made it more and more clear that the US was on a course to war. This policy shift came in two phases. The first came in 1939 with the passage of the Fourth Neutrality Act, which permitted the US to trade arms with belligerent nations as long as these nations came to America to retrieve the arms and paid for them in cash. This policy was quickly dubbed "Cash and Carry." The second phase was the Lend-Lease Act of early 1941, which allowed the President "to lend, lease, sell, or barter arms, ammunition, food, or any 'defense article' or any 'defense information' to 'the government of any country whose defense the President deems vital to the defense of the United States.'" American public opinion supported Roosevelt's actions, and by late 1941 72% of Americans agreed that "the biggest job facing this country today is to help defeat the Nazi government," and 70% thought that defeating Germany was more important than staying out of the war.

Lesson Three

History Overview and Assignments Hostilities Commence

ON SEPTEMBER 1, 1939, Germany invaded Poland, claiming that the Poles had carried out a series of sabotage operations against German targets near the border, an event that caused Britain and France to declare war on Germany. The German-Soviet Treaty of Friendship was a secret supplementary protocol of the 1939 Hitler-Stalin Pact, signed on September 28, 1939, by Nazi Germany and the Soviet Union after their joint invasion and occupation of sovereign Poland that delineated the spheres of interest between the two powers. The Dunkirk evacuation was the removal of Allied soldiers from the beaches and harbor of Dunkirk by the attack of German soldiers, which started as a disaster but soon became a miraculous triumph.



Soldiers of the German army tearing down the border crossing into Poland, 1 September 1939

Discussion Questions

1. What claim did Germany make in justification for invading Poland?
2. List the countries that declared war on Germany soon afterward.
3. Describe the events of the Dunkirk Evacuation. How did British familiarity with Scripture help the stranded Allied forces?
4. What was Vichy France?

Suggested Reading and Assignments

- Review the discussion questions and then read the article: *Hostilities Commence*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Continue adding to your **timeline**, complete with pictures that you find online, recording the events leading up to and during World War II.
- Continue researching the **topic you chose** in Lesson One. Prepare to share your findings.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

Invasion of Poland
Wehrmacht
Red Army

British Expeditionary Force
Directive 13
Luftwaffe

Dunkirk Evacuation
Vichy France
Franco-German Armistice

INVASION OF POLAND

The **Invasion of Poland** was a joint invasion of Poland by Nazi Germany, the Soviet Union, and a small Slovak contingent that marked the beginning of World War II in Europe. The German invasion began on September 1, 1939, one week after the signing of the Molotov-Ribbentrop Pact, while the Soviet invasion commenced on September 17 following another agreement that terminated the Russian and Japanese hostilities in the east on September 16. The campaign ended on October 6 with Germany and the Soviet Union dividing and annexing the whole of Poland under the terms of the German-Soviet Frontier Treaty.

German forces invaded Poland from the north, south, and west the morning after a false flag operation designed to shift blame onto Poland. As the German army, called the **Wehrmacht**, advanced, Polish forces withdrew from their forward bases of operation close to the Polish-German border to more established lines of defense to the east. After a mid-September Polish defeat in the Battle of the Bzura, the Germans gained an undisputed advantage. Polish forces then withdrew to the southeast, where they prepared for a long defense of the Romanian Bridgehead and awaited expected support and relief from France and the United Kingdom. While those two countries had pacts with Poland and declared war on Germany on September 3, in the end their aid to Poland was limited.

The Soviet **Red Army's** invasion of Eastern Poland on September 17, in accordance with a secret protocol of the Molotov-Ribbentrop Pact, rendered the Polish plan of defense obsolete. Facing a second front, the Polish government concluded that defense of the Romanian Bridgehead was no longer feasible and ordered an emergency evacuation of all troops to neutral Romania. On October 6, following the Polish defeat at the Battle of Kock, German and Soviet forces gained full control over Poland. The success of the invasion marked the end of the Second Polish Republic, though Poland never formally surrendered.

On October 8, Germany directly annexed western Poland and placed the remaining block of

territory under the administration of the newly established General Government. The Soviet Union incorporated its newly acquired areas into its constituent Belarusian and Ukrainian republics and immediately started a campaign of sovietization. In the aftermath of the invasion, a collective of underground resistance organizations formed the Polish Underground State within the territory of the former Polish state. Many military exiles who managed to escape Poland subsequently joined the Polish Armed Forces in the West, an armed force loyal to the Polish government in exile.

The Western Allies began a naval blockade of Germany, which aimed to damage the country's economy and war effort. Germany responded by ordering U-boat ("*Unterseeboot*") warfare against Allied merchant and warships, which later escalated into the Battle of the Atlantic.

EVACUATION AT DUNKIRK

In 1939, after Germany's invasion of Poland, the United Kingdom sent the **British Expeditionary Force** (BEF) to aid in the defense of France.

The Maginot Line, a series of fortifications constructed by France, was designed to deter a German invasion across the Franco-German border and funnel an attack into Belgium, where it would be met by the best divisions of the French Army. The area immediately to the north of the Maginot Line was covered by the heavily wooded Ardennes region, which French General Philippe Pétain declared to be "impenetrable" as long as "special provisions" were taken. He believed that any enemy force emerging from the forest would be vulnerable to a *pincer* attack (in which two coordinated forces close in from different directions) and destroyed. With this in mind, the area was left lightly defended.

The German army decided to attack through the Ardennes region, then establish bridgeheads on the Meuse River and rapidly drive to the English Channel. This would cut off the Allied armies in Belgium and Flanders. When this occurred and the French army was surrounded, the British decided on a plan of evacuation, and a withdrawal was planned to Dunkirk, the closest location with good port

facilities. Surrounded by marshes, Dunkirk boasted old fortifications and the longest sand beach in Europe, where large groups could assemble.

After continued engagements, the BEF was trapped along with the remains of the Belgian forces and the three French armies in an area along the northern French coast. By May 24, the Germans had captured the port of Boulogne and surrounded Calais.

Later that day, Hitler issued **Directive 13**, which called for the *Luftwaffe* (the German air force) to defeat the trapped Allied forces and stop their escape. On May 26, Hitler ordered the *panzer* (armored vehicle) groups to continue their advance, but most units took another 16 hours to attack. The delay gave the Allies time to prepare defenses vital for the evacuation and prevented the Germans from stopping the Allied retreat from Lille.

On the first day of the **Dunkirk Evacuation**, only 7,669 men were evacuated, but by the end of the eighth day, a total of 338,226 soldiers had been rescued by a hastily assembled fleet of over 800 boats. Many troops were able to embark from the harbor's concrete breakwater onto 39 British destroyers and other large ships, while others had to wade out from the beaches, waiting for hours in the shoulder-deep water. Some were ferried from the beaches to the larger ships by what came to be known as the "little ships of Dunkirk," a flotilla of hundreds of merchant marine boats, fishing boats, pleasure craft, and lifeboats called into service for the emergency.

"But If Not..."

When the Allied troops at Dunkirk were at their most desperate, facing the imminent arrival of German forces, a British naval officer sent a telegraph to London containing only the words "But if not." That phrase was instantly

recognizable to English Christians, who were familiar with Daniel 3:17-18 in which Daniel's friends were resolved to obey God, whether or not they were saved from the furnace. British citizens heard about the telegraphed plea and answered by sending as many boats as possible across the Channel to rescue soldiers. Over the course of the next eight days, the "Miracle at Dunkirk" flotilla of warships and private vessels rescued more than three hundred thousand soldiers.

Hitler's failure to order a timely assault on Dunkirk was considered one of his most critical mistakes, and the evacuation became one of the great turning points of the war.

VICHY FRANCE

Vichy France is the common name of the French State headed by Marshal Philippe Pétain during World War II, after the French were defeated by the Nazis in 1940. The **Franco-German Armistice** of June 22, 1940 divided France into two zones: one to be under German military occupation and one to be left to the French in full sovereignty, at least nominally. This zone comprised the southeastern two-fifths of the country.

From 1940 to 1942, while the Vichy regime was the nominal government of France as a whole, Germany's military occupied northern France. Thus, while Paris remained the *de jure* capital of France, the *de facto* capital of southern "unoccupied" France was the town of Vichy, 360 km to the south. Following the Allied landings in French North Africa in November 1942, southern France was also militarily occupied by Germany and Italy. The Vichy government remained in existence, but as a puppet of Nazi Germany. It vanished in late 1944 when the Allies occupied all of France.

Lesson Four

History Overview and Assignments The European Front

THE BATTLE OF BRITAIN, when the British Royal Air Force defended the United Kingdom against the German Air Force attacks, was the first major Nazi defeat and a turning point of World War II. The Battle of the Atlantic was the longest continuous military campaign in World War II, running from 1939 to the defeat of Germany in 1945. The Holocaust, directed by Adolf Hitler and the Nazi Party, was responsible for the: the deliberate and systematic extermination of approximately six million Jews, 2.7 million ethnic Poles, and four million others who were deemed "unworthy of life."



Battle of Britain air observer

Key People, Places, and Events

Winston Churchill
Battle of France
Royal Air Force
Blitz
Battle of Britain
Battle of the Atlantic
Operation Barbarossa
Operation Typhoon
Battle of Moscow
Holocaust
SS
Kristallnacht

Suggested Reading and Assignments

- Review the discussion questions then read the article: *The European Front*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Continue adding to your **timeline** of the events of World War II.
- Continue researching the **topic you chose** in Lesson One. Prepare to share your findings.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Vocabulary

aggregate
countervailing
ideology

Discussion Questions

1. How did Winston Churchill gain public support for resistance to Nazi Germany?
2. What was the Blitz, and when did it take place?
3. What were the Axis and Allied forces fighting over in the Battle of the Atlantic?
4. Evaluate the German U-boat strategy against the Allied convoys.
5. What was Operation Barbarossa, and how did it represent a breach of faith on Hitler's part?
6. What miscalculations did Hitler make during this campaign?
7. What was the outcome of the operation, and in what major way did it mark a turning point in the war—and the political landscape of Europe?
8. List some ways in which Hitler involved all branches of governmental administration and cultural institutions to carry out the atrocities of the Holocaust without interference.
9. To benefit from hindsight, name some preventive measures Christians and other Nazi opponents could have undertaken in the years before the Holocaust that might have averted this horrifically tragic page of history.

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The European Front

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BATTLE OF BRITAIN

The early stages of World War II saw successful German invasions on the Continent aided by the air power of the Luftwaffe, which was able to establish tactical air superiority with great efficiency.

On May 10, 1940, the day **Winston Churchill**

became British Prime Minister, the Germans initiated the **Battle of France** with an aggressive invasion of French territory. The British **Royal Air Force** Fighter Command was desperately short of trained pilots and aircraft, but despite the objections of its commander that the diversion of his forces would leave home defenses weak, Churchill sent

fighter squadrons to support operations in France, where the RAF suffered heavy losses.

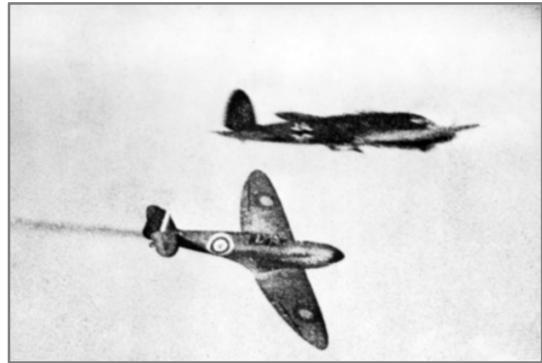


Winston Churchill, British Prime Minister, in 1941

After the evacuation of British and French soldiers from Dunkirk and the French surrender on June 22, 1940, Hitler mainly focused his energies on the possibility of invading the Soviet Union in the belief that the British, defeated on the continent and without European allies, would quickly come to terms. The Germans were so convinced of an imminent armistice that they began constructing street decorations for the homecoming parades of victorious troops. Although the British Foreign Secretary, Lord Halifax, and certain elements of the British public favored negotiated peace with an ascendant Germany, Churchill and a majority of his Cabinet refused to consider an armistice. Instead, Churchill used his skillful rhetoric to harden public opinion against capitulation and prepare the British for a long war. In his “This was their finest hour” speech of 18 June 1940, Churchill declared:

What General Weygand has called the Battle of France is over. The Battle of Britain is about to begin. Upon this battle depends the survival of Christian civilization. Upon it depends our own British life and the long continuity of our institutions and our Empire. The whole fury and might of the enemy must very soon be turned on us. Hitler knows that he will have to break us in this island or lose the war. If we can stand up to him, all Europe may be free, and the life of the world may move forward into broad, sunlit uplands. But if we fail, then the whole world, including the United States, including all that we have known and cared for, will sink into the abyss of a new Dark Age made more sinister, and perhaps more protracted, by the lights of a perverted science. Let us therefore brace

ourselves to our duties, and so bear ourselves that, if the British Empire and its Commonwealth last for a thousand years, men will still say, “This was their finest hour.”



British Supermarine Spitfire fighter aircraft (bottom) flying past a German Heinkel He 111 bomber aircraft (top) during the Battle of Britain in 1940

The Blitz

Adolf Hitler turned his attention toward destroying the Royal Air Force to allow an invasion of Britain. The **Blitz**, from the German word *blitzkrieg* (“lightning war”) was the name borrowed by the British press and applied to the heavy and frequent German bombing raids carried out over Britain in 1940 and 1941. This concentrated, direct bombing of industrial targets and civilian centers began with heavy raids on London on September 7, 1940, during the **Battle of Britain**. In response to an RAF raid on Berlin, the Germans changed their tactics to the sustained bombing of civilian targets.

From September 7, 1940, one year into the war, London was systematically bombed by the Luftwaffe for 57 consecutive nights. More than one million London houses were destroyed or damaged and more than 40,000 civilians were killed, almost half of them in London. Ports and industrial centers outside London were also attacked.



Hawker Hurricane R4118 fought in the Battle of Britain. Here it arrives at the 2014 Royal International Air Tattoo, England. Photo by Adrian Pingstone

The bombing, however, failed to demoralize the British into surrender or significantly damage the war economy. The eight months of bombing never seriously hampered British production, and the war industries continued to operate and expand.

By May 1941, the threat of an invasion of Britain had ended, and Hitler's attention turned to Operation Barbarossa, the invasion of the Soviet Union. In comparison to the later Allied bombing campaign against Germany, the Blitz resulted in relatively few casualties; the British bombing of Hamburg in July 1943 inflicted some 42,000 civilian deaths, about the same as the entire Blitz.



Barrage balloons over London during World War II. Barrage balloons held steel cables above the ground to endanger enemy aircraft. Their shape retained more stability in wind than spherical balloons.

BATTLE OF THE ATLANTIC

The **Battle of the Atlantic** was the longest continuous military campaign in World War II, running from 1939 to the defeat of Germany in 1945. At its core was the Allied naval blockade of Germany, announced the day after the declaration of war, and Germany's subsequent counter-blockade. This battle peaked from mid-1940 through to the end of 1943. The Battle of the Atlantic pitted U-boats and other warships of the *Kriegsmarine* (German navy) and aircraft of the Luftwaffe (German Air Force) against the Royal Canadian Navy, Royal Navy, United States Navy, and Allied merchant shipping. The convoys, mainly from North America and going to the United Kingdom and the Soviet Union, were primarily protected for the most part by the British and Canadian navies and air forces. These forces were aided by ships and aircraft of the United States from September 13, 1941. The Germans were joined by submarines of the Italian Royal Navy after their Axis ally Italy entered the war on June 10, 1940.

Early Skirmishes

In 1939, the *Kriegsmarine* lacked the strength to challenge the combined British Royal Navy and French Navy for command of the sea. Instead,

German naval strategy relied on commerce raiding using capital ships, armed merchant cruisers, submarines, and aircraft. Many German warships were already at sea when war was declared, including most of the available U-boats and the "pocket battleships" which sortied into the Atlantic in August. These ships immediately attacked British and French shipping. U-30 sank the ocean liner SS *Athenia* within hours of the declaration of war, in breach of her orders not to sink passenger ships. The U-boat fleet which dominated so much of the Battle of the Atlantic was small at the beginning of the war; many of the 57 available U-boats were the small and short-range Type IIs, useful primarily for mine laying and operations in British coastal waters. Much of the early German anti-shipping activity involved mine laying by destroyers, aircraft, and U-boats off British ports.

With the outbreak of war, the British and French immediately began a blockade of Germany, although this had little immediate effect on German industry. The Royal Navy quickly introduced a convoy system for the protection of trade that gradually extended out from the British Isles, eventually reaching as far as Panama, Bombay, and Singapore. Convoys allowed the Royal Navy to concentrate its escorts near the one place the U-boats were guaranteed to be found, the convoys. Each convoy consisted of between 30 and 70 mostly unarmed merchant ships.

Evaluation

Some historians maintain that the German U-boat strategy of attacking convoys *en masse* like a wolf pack came close to winning the Battle of the Atlantic, that the Allies were almost defeated, and that Britain was brought to the brink of starvation. But at no time during the campaign were supply lines to Britain interrupted. In all, during the Atlantic Campaign only 10% of transatlantic convoys that sailed were attacked, and of those attacked only about 10% were lost. More than 99% of all ships sailing to and from the British Isles during World War II did so successfully.

The Germans failed to stop the flow of strategic supplies to Britain, resulting in the buildup of troops and supplies needed for the D-Day landings. The defeat of the U-boat was a necessary precursor for accumulation of Allied troops and supplies to ensure Germany's defeat.

Victory was achieved at a huge cost, however: between 1939 and 1945, 3,500 Allied merchant ships (totaling 14.5 million gross tons) and 175 Allied

warships were sunk, and some 72,200 Allied naval and merchant seamen lost their lives. The Germans lost 783 U-boats and approximately 30,000 sailors killed, three-quarters of Germany's 40,000-man U-boat fleet.

OPERATION BARBAROSSA

Operation Barbarossa was the code name for Nazi Germany's World War II invasion of the Soviet Union, which began on June 22, 1941. The operation was driven by Adolf Hitler's desire to destroy the Soviet Union as outlined in his 1925 political manifesto and autobiography, *Mein Kampf*.

Setting the Stage for the Invasion

In the two years leading up to the invasion, the two countries had signed political and economic pacts for strategic purposes. Nevertheless, on December 18, 1940, Hitler authorized an invasion of the Soviet Union. Over the course of the operation, about four million Axis soldiers invaded the Soviet Union along an 1,800-mile front, the largest invasion force in the history of warfare. In addition to troops, the Germans employed some 600,000 motor vehicles and between 600,000 and 700,000 horses. It transformed the perception of the Soviet Union from aggressor to victim and marked the beginning of the rapid escalation of the war, both geographically and in the formation of the Allied coalition.

Motivations for Invading the USSR

As early as 1925, Adolf Hitler had vaguely declared in *Mein Kampf* that he would invade the Soviet Union, asserting that the German people needed to secure living space to ensure the survival of Germany for generations to come. On February 10, 1939, Hitler told his army commanders that the next war would be "a racial war." On November 23, once World War II already started, Hitler declared that "Racial war has broken out and this war shall determine who shall govern Europe, and with it, the world." The racial policy of Nazi Germany viewed the Soviet Union (and all of Eastern Europe) as populated by non-Aryan *Untermenschen* ("sub-humans"), ruled by "Jewish Bolshevik conspirators." Hitler claimed in *Mein Kampf* that Germany's destiny was to "turn to the East" as it did "six hundred years ago." Accordingly, it was stated Nazi policy to kill, deport, or enslave the majority of Russian and other Slavic populations and repopulate

the land with Germanic peoples, under the *Generalplan Ost* ("General Plan for the East"). The Germans' belief in their ethnic superiority is discernible in official German records and by pseudoscientific articles in German periodicals at the time, which covered topics such as "how to deal with alien populations."

Overview of the Battles

The initial momentum of the German ground and air attack completely destroyed the Soviet organizational command and control within the first few hours, paralyzing every level of command from the infantry platoon to the Soviet High Command in Moscow. But four weeks into the campaign, the Germans realized they had grossly underestimated Soviet strength.

Hitler now sought to defeat the Soviets by economic damage, depriving them of the industrial capacity to continue the war. That meant seizing the industrial center of Kharkov, the Donbass, and the oil fields of the Caucasus in the south and the speedy capture of Leningrad, a major center of military production, in the north.

After a German victory in Kiev, the Red Army no longer outnumbered the Germans and no more trained reserves were available. To defend Moscow, Stalin could field 800,000 men in 83 divisions, but no more than 25 divisions were fully effective.

Operation Typhoon, the drive to Moscow, began on October 2. The Germans initially won several important battles, and the German government now publicly predicted the imminent capture of Moscow and convinced foreign correspondents of a pending Soviet collapse. On December 2, the German army advanced to within 15 miles of Moscow and could see the spires of the Kremlin, but by then the first blizzards of Russian winter had already begun.

The Wehrmacht was not equipped for winter warfare, and the bitter cold caused severe problems for their guns and equipment. Further, weather conditions grounded the Luftwaffe from conducting large-scale operations. Newly created Soviet units near Moscow now numbered over 500,000 men, and on December 5, they launched a massive counterattack as part of the **Battle of Moscow** that pushed the Germans back over 200 miles. By late December 1941, the Germans had lost the Battle for Moscow, but the invasion had cost the German army over 830,000 casualties in killed, wounded, captured, or missing in action.

Significance

Operation Barbarossa was the largest military operation in human history—more men, tanks, guns, and aircraft were committed than had ever been deployed before in a single offensive. Seventy-five percent of the entire German military participated. The invasion opened up the Eastern Front of World War II, the largest theater of war during that conflict, which witnessed titanic clashes of unprecedented violence and destruction for four years, resulting in the deaths of more than 26 million people. More people died fighting on the Eastern Front than in all other fighting across the globe during World War II. Damage to both the economy and landscape was enormous for the Soviets as approximately 1,710 towns and 70,000 villages were completely annihilated.

More than just ushering in untold death and devastation, Operation Barbarossa and the subsequent German failure to achieve their objectives changed the political landscape of Europe, dividing it into eastern and western blocs. The gaping political vacuum left in the eastern half of the continent was filled by the USSR when Stalin secured his territorial prizes of 1939–40 and firmly placed his Red Army in Bulgaria, Romania, Hungary, Poland, Czechoslovakia, and the eastern half of Germany. As a consequence, eastern Europe became Communist in political disposition, while western Europe fell under the democratic sway of the United States, a nation uncertain about its future policies in Europe. Instead of profiting the German people, Operation Barbarossa's failure instigated untold suffering when an estimated 1.4 million ethnic Germans died as a result of their forced flight from the East to the West, whether during the German retreat or later following the surrender.

HOLOCAUST

The **Holocaust**, also known as the *Shoah* (Hebrew for “the catastrophe”), was a genocide in which Adolf Hitler's Nazi Germany and its collaborators killed approximately six million Jews. The victims included 1.5 million children and represented about two-thirds of the nine million Jews who resided in Europe. Some definitions of the Holocaust include the additional five million non-Jewish victims of Nazi mass murders, bringing the total to about 11 million. Killings took place throughout Nazi Germany, German-occupied

territories, and territories held by allies of Nazi Germany.



Starved Holocaust prisoners, nearly dead from hunger, pose in concentration camp in Ebensee, Austria. Ebensee was a sub-camp of the main camp Mauthausen near the town of the same name. The camp was reputedly used for “scientific” experiments. It was liberated by the 80th Division of the US Army. Photo taken by Lt. Arnold E. Samuelson on 7 May 1945

Plan for Genocide

From 1941 to 1945, Jews were systematically murdered in one of the deadliest genocides in history, part of a broader **aggregate** of acts of oppression and killings of various ethnic and political groups in Europe by the Nazi regime. Under the coordination of the **SS** (*Schutzstaffel*, or Protection Squads, a major paramilitary Nazi organization) and direction from the highest leadership of the Nazi Party, every arm of Germany's bureaucracy was involved in the logistics and administration of the genocide. Other victims of Nazi crimes included ethnic Poles, Soviet citizens and Soviet POWs, other Slavs, Romanis, Communists, homosexuals, Freemasons, Jehovah's Witnesses, and the mentally and physically disabled. A network of about 42,500 facilities in Germany and German-occupied territories was used to “concentrate” victims for slave labor, mass murder, and other human rights abuses. Over 200,000 people were Holocaust perpetrators.

The persecution and genocide were carried out in stages, culminating in what Nazis termed the “Final Solution to the Jewish Question,” an agenda to exterminate Jews in Europe. Initially, the German government passed laws to exclude Jews from civil society, most prominently the Nuremberg Laws of 1935. Nazis established a network of concentration camps starting in 1933 and ghettos following the

outbreak of World War II in 1939. In 1938, legal repression and resettlement turned to violence on ***Kristallnacht*** (“Night of Broken Glass”), when Jews were attacked, and Jewish property vandalized. Over 7,000 Jewish shops and more than 1,200 synagogues (roughly two-thirds of the synagogues in areas under German control) were damaged or destroyed. In 1941, as Germany conquered new territory in eastern Europe, specialized paramilitary units called *Einsatzgruppen* (“death squads”) murdered around two million Jews, partisans, and others, often in mass shootings. By the end of 1942, victims were regularly transported by freight trains to extermination camps where most who survived the journey were systematically killed in gas chambers. This continued until the end of World War II in Europe in April–May 1945.

Jewish armed resistance was limited. The most notable exception was the Warsaw Ghetto uprising of 1943, when thousands of poorly-armed Jewish fighters held the Waffen-SS at bay for four weeks. An estimated 20,000–30,000 Jewish partisans actively fought against the Nazis and their collaborators in Eastern Europe. French Jews took part in the French Resistance, which conducted a guerrilla campaign against the Nazis and Vichy French authorities. More than 100 armed Jewish uprisings took place.

Distinguishing Features

All branches of Germany’s bureaucracy were engaged in the logistics that led to the genocides, turning the Third Reich into what one Holocaust scholar, Michael Berenbaum, has called “a genocidal state”:

Every arm of the country’s sophisticated bureaucracy was involved in the killing process. Parish churches and the Interior Ministry supplied birth records showing who was Jewish; the Post Office delivered the deportation and denaturalization orders; the Finance Ministry confiscated Jewish property; German firms fired Jewish workers and disenfranchised Jewish stockholders.

Saul Friedländer writes that: “Not one social group, not one religious community, not one scholarly institution or professional association in Germany and throughout Europe declared its solidarity with the Jews.” He writes that some Christian churches declared that converted Jews should be regarded as part of the flock, but only up to a point. Friedländer argues that this makes the Holocaust distinctive because antisemitic policies

were able to unfold without the interference of **countervailing** forces normally found in advanced societies, such as industry, small businesses, churches, trade unions, and other vested interests and lobby groups.

In many other genocides, pragmatic considerations such as control of territory and resources were central to the genocide policy. The Holocaust, however, was driven almost entirely by **ideology**. Israeli historian and scholar Yehuda Bauer argues:

The basic motivation [of the Holocaust] was purely ideological, rooted in an illusionary world of Nazi imagination, where an international Jewish conspiracy to control the world was opposed to a parallel Aryan quest. No genocide to date had been based so completely on myths, on hallucinations, on abstract, nonpragmatic ideology—which was then executed by very rational, pragmatic means.

The use of extermination camps (also called “death camps”) equipped with gas chambers for the systematic mass extermination of peoples was an unprecedented feature of the Holocaust. These were established at Auschwitz, Belzec, Chelmno, Jasenovac, Majdanek, Maly Trostenets, Sobibór, and Treblinka. They were built for the systematic killing of millions, primarily by gassing but also by other execution methods and extreme work under starvation conditions. Stationary facilities built for the purpose of mass extermination resulted from earlier Nazi experimentation with poison gas during the secret Action T4 euthanasia program against mental patients. Rudolf Höss, the longest-serving commandant of Auschwitz concentration camp, said:

Another improvement we made over Treblinka was that we built our gas chambers to accommodate 2,000 people at one time, whereas at Treblinka their 10 gas chambers only accommodated 200 people each. The way we selected our victims was as follows: we had two SS doctors on duty at Auschwitz to examine the incoming transports of prisoners. The prisoners would be marched by one of the doctors who would make spot decisions as they walked by. Those who were fit for work were sent into the Camp. Others were sent immediately to the extermination plants. Children of tender years were invariably exterminated, since by reason of their youth they were unable to work. Still another improvement we made over Treblinka was that at Treblinka the victims almost always knew that they were to be

exterminated and at Auschwitz we endeavored to fool the victims into thinking that they were to go through a delousing process. Of course, frequently they realized our true intentions and we sometimes had riots and difficulties due to that fact. Very frequently women would hide their children under the clothes but of course when we found them, we

would send the children in to be exterminated. We were required to carry out these exterminations in secrecy but of course the foul and nauseating stench from the continuous burning of bodies permeated the entire area, and all of the people living in the surrounding communities knew that exterminations were going on at Auschwitz.

Lesson Five

History Overview and Assignments The Pacific War

THE ATTACK ON PEARL HARBOR was a surprise military strike by the Imperial Japanese Navy against the United States naval base on the morning of December 7, 1941, which led to the US entry into World War II. During the attacks, 188 US aircraft were destroyed, 2,403 Americans were killed, and 1,178 others were wounded. The Battle of Midway was a decisive naval battle in the Pacific Theater, won by the American navy after code-breakers learned the date and time of the Japanese attack. The Guadalcanal Campaign marked the decisive Allied transition from defensive operations to the strategic initiative in the Pacific Theater, leading to offensive operations that eventually resulted in Japan's surrender and the end of World War II. Up to this point, the Allies had been on the defensive in the Pacific, but the strategic victories at Midway and other battles provided an opportunity to seize the initiative from Japan.



The USS *Arizona* was a total loss in the Japanese surprise air attack on the American Pacific Fleet at Pearl Harbor, Sunday 7 December 1941. The ship ultimately sank, taking the lives of 1,177 crew members.

Suggested Reading and Assignments

- Review the discussion questions then read the article: *The Pacific War*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary word in the context of the reading. Write the word and its definition in the vocabulary section of your history notebook.
- Continue adding to your **timeline** of the events of World War II.
- Continue researching the **topic you chose** in Lesson One. Prepare to share your findings.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

Attack on Pearl Harbor
Douglas MacArthur
War Production Board

Internment of Japanese Americans
Executive Order 9066
Civil Liberties Act of 1988

Battle of Midway
Chester Nimitz
Battle of Guadalcanal

Discussion Questions

1. On what date did the Japanese attack the American naval base at Pearl Harbor?
2. Describe Japanese motivations for the attack.
3. How was Executive Order 9066 an unjustifiable response to the attack on Pearl Harbor?
4. What happened after the Japanese planned an attack on US naval forces at Midway?
5. How did the battles at Midway and Guadalcanal prove to be a turning point for the Allies?

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The Pacific War

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ATTACK ON PEARL HARBOR

The **Attack on Pearl Harbor** was a surprise military strike conducted by the Imperial Japanese Navy against the United States naval base at Pearl Harbor, Hawaii, on the morning of December 7, 1941. The attack was intended as a preventive action to keep the US Pacific Fleet from interfering with military actions the empire of Japan was planning in Southeast Asia against overseas territories of the United Kingdom, the Netherlands, and the United States.

Motivations

Facing the problem of insufficient natural resources and following the ambition to become a major global power, the Japanese Empire had begun aggressive expansion in the 1930s. After Japan invaded and conquered Manchuria, Jehol, and China, it invaded French Indochina in an effort to control supplies reaching China. In July 1941, the US ceased oil exports to Japan. This caused the Japanese to proceed with plans to take the Dutch East Indies, an oil-rich territory. Following the developments, Japan and the US engaged in negotiations in an effort to improve relations. After exchanging a series of conditions, Japan presented its final proposal. On November 20, 1941, it offered to withdraw forces from southern Indochina and not to launch any attacks in Southeast Asia provided that the US, the UK, and the Netherlands ceased aiding China and lifted their sanctions against Japan. The American counterproposal of November 26 required

Japan to evacuate all of China without conditions and conclude non-aggression pacts with Pacific powers. However, the day before the proposal was delivered (November 27), the main Japanese attack fleet left port for Pearl Harbor.



West Virginia was sunk by six torpedoes and two bombs during the attack.

US Navy, Office of Public Relations

Attack

The base was attacked by 353 Japanese fighters, bombers, and torpedo planes in two waves, launched from six aircraft carriers. All eight US Navy battleships were damaged, and four were sunk. The Japanese also sank or damaged three cruisers, three destroyers, an anti-aircraft training ship, and one mine layer. In all, 188 US aircraft were destroyed, 2,402 Americans were killed and 1,282 wounded. Japanese losses were light: 29 aircraft and five midget submarines lost. Sixty five servicemen killed or wounded, and one Japanese sailor was captured.

Effect

The attack came as a profound shock to the American people and led directly to the American entry into World War II, in both the Pacific and European theaters. The following day (December 8), the United States declared war on Japan. Domestic support for non-interventionism, which had been traditionally strong but fading since the fall of France in 1940, disappeared. Clandestine support of Britain (for example the Neutrality Patrol) was replaced by active alliance. Subsequent operations by the US prompted Germany and Italy to declare war on the US on December 11, which was reciprocated by the US the same day. General **Douglas MacArthur** formed a new intelligence operation and started decoding Japanese messages. Meanwhile, the US sped up production of warships.

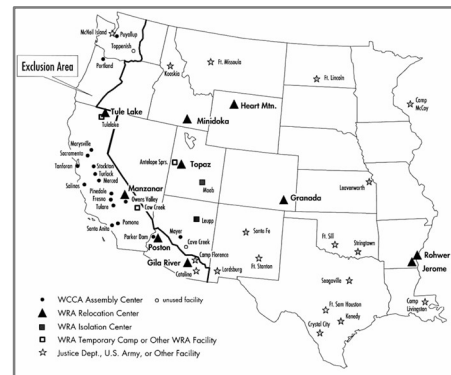
The **War Production Board** (WPB) was established as a government agency on January 16, 1942, by executive order of Franklin D. Roosevelt. The WPB directed conversion and expansion of peacetime industries to meet war needs, allocated scarce materials vital to war production, established priorities in the distribution of materials and services, and prohibited non-essential production. It rationed such commodities as gasoline, heating oil, metals, rubber, paper, and plastics. The WPB and the nation's factories effected a great turnaround. Military aircraft production, which totaled 6,000 in 1940, jumped to 85,000 in 1943. Factories that made silk ribbons started producing parachutes, automobile factories built tanks, typewriter companies made machine guns, undergarment manufacturers sewed mosquito netting, and a roller coaster manufacturer converted to the production of bomber repair platforms. The WPB ensured that each factory received materials it needed to operate, in order to produce the most war goods in the shortest time.



J. Howard Miller's "We Can Do It!" poster from 1943

Internment of Japanese Americans

One of the most controversial consequences of the attack was the creation of internment camps for Japanese American residents and citizens. Within hours of the attack, hundreds of Japanese American leaders were rounded up and brought to high-security camps such as Sand Island at the mouth of Honolulu Harbor and Kilauea Military Camp on the island of Hawaii. Roosevelt authorized the deportation and incarceration with **Executive Order 9066**, issued February 19, 1942. Over the course of the next three years, over 120,000 Japanese Americans, including United States citizens, were removed from their homes, and transferred to internment camps in California, Idaho, Utah, Arizona, Wyoming, Colorado, New Mexico, Arkansas, and Texas. Evidence suggests that the internment was racially motivated and not a military necessity.



Map of forced internment camp locations — used for the internment of Japanese American citizens during World War II

According to a 1943 War Relocation Authority report, internees were housed in "tar paper-covered barracks of simple frame construction without plumbing or cooking facilities of any kind." The spartan facilities of the camps met international laws, but still left much to be desired. Many camps were built based on designs for military barracks, making the buildings poorly equipped for cramped family living. Many were surrounded by barbed wire with unpartitioned toilets, had cots for beds, and supplied a budget of 45 cents daily per capita for food rations. Because most internees were evacuated from their West Coast homes on short notice and not told of their assigned destinations, many failed to pack appropriate clothing for the desert winters in some camps, for example, which often reached temperatures below zero Fahrenheit. Armed guards were posted at the camps, which were all in remote, desolate areas far from population centers.

A doctor was appointed to manage each facility, and additional healthcare staff worked under his supervision, although the United States Public Health Service recommendation of one physician for every 1,000 inmates and one nurse to 200 inmates was not met. Overcrowded and unsanitary conditions forced assembly center infirmaries to prioritize inoculations over general care, obstetrics, and surgeries; at Manzanar, for example, hospital staff performed more than 40,000 immunizations against typhoid and smallpox. Food poisoning was common and also demanded significant attention. Those who were interned in Topaz, Minidoka, and Jerome experienced outbreaks of dysentery.

Japanese Americans also encountered hostility and even violence when they returned to the West Coast. There were dozens of reports of gun shots, fires, and explosions aimed at Japanese-American homes, businesses, and places of worship, in addition to incidents of nonviolent crimes such as vandalism and the defacing of Japanese graves.

Many historians see the decision as one of the most shameful chapters in the history of the Roosevelt administration, and President Reagan offered a formal apology forty-four years after the executive order was issued, by means of the **Civil Liberties Act of 1988**. By means of this act, monetary reparations were granted to Japanese Americans who had been interned during World War II.



Japanese Americans awaiting "relocation."
Photo by Dorothea Lange, US National Archives and Records Administration (May 8, 1942)

BATTLE OF MIDWAY

The **Battle of Midway** was a decisive naval battle in the Pacific Theater. Between June 4 and 7, 1942, only six months after Japan's attack on Pearl Harbor and one month after a battle in the Coral Sea put a halt to the Japanese advance toward Australia,

the United States Navy under Admiral **Chester Nimitz** decisively defeated an attacking fleet of the Imperial Japanese Navy near Midway Atoll, inflicting devastating damage on the Japanese fleet that proved irreparable. Military historian John Keegan called it "the most stunning and decisive blow in the history of naval warfare."



Midway Atoll, several months before the battle. Eastern Island (with the airfield) is in the foreground, and the larger Sand Island is in the background to the west.

The plan was handicapped by faulty Japanese assumptions regarding the American reaction. Most significantly, American cryptographers were able to determine the date and location of the planned attack, enabling the forewarned US Navy to prepare its own ambush. All four of Japan's large aircraft carriers and a heavy cruiser were sunk, while the US lost only the carrier *Yorktown* and a destroyer. After Midway and the exhausting attrition of the Solomon Islands campaign, Japan's capacity to replace its losses in ships (particularly aircraft carriers) and men (especially well-trained pilots and maintenance crewmen) rapidly became insufficient to cope with mounting casualties, while the United States' massive industrial and training capabilities made losses far easier to replace. The Battle of Midway, along with the Guadalcanal Campaign, is considered a turning point in the Pacific War.

BATTLE OF GUADALCANAL

The **Battle of Guadalcanal** was one of the first prolonged campaigns in the Pacific. On August 7, 1942, Allied forces, predominantly American, landed on the islands of Guadalcanal, Tulagi, and Florida in the southern Solomon Islands, with the objective of denying their use by the Japanese to threaten the

supply and communication routes between the US, Australia, and New Zealand. The Allies overwhelmed the outnumbered Japanese defenders and captured Tulagi and Florida as well as an airfield (later named Henderson Field) that was under construction on Guadalcanal. Powerful US naval forces supported the landings.

Surprised by the Allied offensive, the Japanese made several attempts between August and November of 1942 to retake Henderson Field. Three major land battles, seven large naval battles, and continual, almost daily aerial battles, culminated in the decisive Naval Battle of Guadalcanal in early November 1942. The last Japanese attempt to bombard Henderson Field from the sea and land with enough troops to retake it was defeated. In December 1942, the Japanese abandoned further efforts to retake Guadalcanal and evacuated their remaining forces by February 7, 1943, in the face of an offensive by the US Army's XIV Corps, conceding the island to the Allies.

Effect

The Guadalcanal Campaign was a significant strategic combined arms victory by Allied forces over the Japanese in the Pacific Theater. The Japanese had reached the high-water mark of their conquests in the Pacific, and Guadalcanal marked the transition by the Allies from defensive operations to the strategic offensive in that theater and the beginning of offensive operations, including the Solomon Islands, New Guinea, and Central Pacific campaigns, which resulted in Japan's eventual surrender and the end of World War II.

Perhaps as important as the military victory for the Allies was the psychological victory. On a level playing field, the Allies had beaten Japan's best land, air, and naval forces. After Guadalcanal, Allied personnel regarded the Japanese military with much less fear and awe than previously. In addition, the Allies viewed the eventual outcome of the Pacific War with greatly increased optimism.

Lesson Six

History Overview and Assignments The Allies Gain Ground

THE BATTLE OF STALINGRAD has been described as the biggest defeat in the history of the German Army and a decisive turning point in the downfall of Hitler in World War II. The North African Campaign was fought between the Allies and Axis powers, many of whom had colonial interests in Africa dating from the late 19th century. It included campaigns fought in the Libyan and Egyptian deserts in Morocco, Algeria, and Tunisia. The Allied invasion of Sicily, code named *Operation Husky*, was a major campaign of World War II in which the Allies took the island of Sicily from the Axis powers. Joint Allied forces planned and commanded the invasion of Sicily in July 1943, followed in September by the invasion of the Italian mainland and the campaign on Italian soil until the surrender of the German Armed Forces in Italy in May 1945.



The winter of 1942 saw Russia defending Stalingrad from German capture. The German tanks aided in the battle, which ultimately left the city in ruins.

Key People, Places, and Events

Battle of Stalingrad	Operation Torch
Operation Uranus	Operation Mincemeat
Joseph Goebbels	Operation Husky
North African Campaign	George S. Patton
Operation Compass	Bernard Montgomery
Erwin Rommel	Tehran Conference
Second Battle of El Alamein	

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the combined article: *The Allies Gain Ground*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary word in the context of the reading. Write the word and its definition in the vocabulary section of your history notebook.
- Continue adding to your **timeline** of the events of World War II.
- Complete your research on the **topic you chose** in Lesson One. Be ready to share what you have learned.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Vocabulary

oblique

Discussion Questions

1. What was the significance to the Allies of the German defeat at Stalingrad?
2. List the events and results of the North African Campaign.
3. Describe the events and outcome of "Operation Mincemeat."
4. What was the result of Operation Husky, and who were the operation's primary Allied commanders?
5. To what did the Italian government agree on September 3, 1943?
6. What was the main outcome of the Tehran Conference?

Adapted for High School from:

Boundless World History

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The Allies Gain Ground

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BATTLE OF STALINGRAD

By the spring of 1942, despite the failure of Operation Barbarossa to decisively defeat the Soviet Union in a single campaign, the Germans had captured vast expanses of European territory, including Ukraine, Belarus, and the Baltic republics. Hitler was confident he could master the Red Army after the winter of 1942, because despite heavy losses suffered west of Moscow the previous winter, most of its infantry had not been engaged and was rested and re-equipped. Stalin was expecting the main thrust of the German summer attacks to be directed against Moscow again.

The **Battle of Stalingrad** began in late summer 1942. The German offensive was supported by intensive Luftwaffe bombing that reduced much of the city to rubble. The fighting degenerated into house-to-house fighting, and both sides poured reinforcements into the city. By mid-November 1942, the Germans pushed the Soviet defenders back at great cost into narrow zones along the west bank of the Volga River.

On November 19, 1942, the Red Army launched **Operation Uranus**, a two-pronged attack targeting the weaker Romanian and Hungarian

forces protecting the German 6th Army's flanks. The Axis forces on the flanks were overrun, and the 6th Army was cut off and surrounded in the Stalingrad area. Hitler ordered the army to stay in Stalingrad and make no attempt to break out; instead, attempts were made to supply the army by air and to break the encirclement from the outside. Heavy fighting continued for another two months. By the beginning of February 1943, the Axis forces in Stalingrad had exhausted their ammunition and food. The remaining elements of the 6th Army surrendered. The battle lasted five months, one week, and three days.

Aftermath

The German public was not officially told of the impending disaster until the end of January 1943, though positive media reports ended in the weeks before the announcement. Stalingrad marked the first time that the Nazi government publicly acknowledged a failure in its war effort; it was not only the first major setback for the German military, but a crushing, unprecedented defeat where German losses were almost equal to those of the Soviets. Prior losses of the Soviet Union were generally three times as high as the German ones.

On January 31, regular programming on German state radio was replaced by a broadcast of the somber *Adagio* movement from Anton Bruckner's *Seventh Symphony*, followed by the announcement of the defeat at Stalingrad.



Wartime poster for the United Nations, created in 1943 by the US Office of War Information

Significance

Stalingrad has been described as the biggest defeat in the history of the German Army. It is often identified as the turning point on the Eastern Front, in the war against Germany overall, and the entire Second World War. Before Stalingrad, the German forces went from victory to victory on the Eastern Front, with only a limited setback in the winter of 1941-42. After Stalingrad, they won no decisive battles, even in summer. The Red Army had the initiative, and the Wehrmacht was in retreat.

Germany's defeat shattered its reputation for invincibility and dealt a devastating blow to morale. On January 30, 1943, the 10th anniversary of his coming to power, Hitler chose not to speak. The chief Nazi propagandist **Joseph Goebbels** read the text of his speech for him on the radio. The speech contained an **oblique** reference to the battle which suggested that Germany was now in a defensive war. The public mood was sullen, depressed, fearful, and war-weary. Germany was looking in the face of defeat.

The reverse was the case on the Soviet side. There was an overwhelming surge in confidence and belief in victory. Stalin was celebrated as the hero of the hour and made a Marshal of the Soviet Union.

The news of the battle echoed round the world, with many people now believing that Hitler's defeat was inevitable.

NORTH AFRICAN CAMPAIGN

The **North African Campaign** of the Second World War took place in North Africa from June of 1940 to May of 1943. It included campaigns fought in the Libyan and Egyptian deserts (Western Desert Campaign, also known as the Desert War) and in Morocco and Algeria (Operation Torch) and Tunisia (Tunisia Campaign).

The campaign was fought between the Allies and Axis powers, many of whom had colonial interests in Africa dating from the late 19th century. The Allied war effort was dominated by the British Commonwealth and exiles from German-occupied Europe. The United States entered the war in December 1941 and began direct military assistance in North Africa on May 11, 1942.



The vast military knowledge of German Field Marshal Erwin Rommel, known as the "Desert Fox," was not enough to keep British and American forces from driving German troops from North Africa in late 1942.

Bundesarchiv, Bild 146-1973-012-43 / Unknown / CC-BY-SA 3.0

Fighting in North Africa started with the Italian declaration of war on June 10, 1940. On June 14, the British Army crossed the border from Egypt into Libya and captured the Italian Fort Capuzzo. This was followed by an Italian counter-offensive into Egypt and the capture of Sidi Barrani in September 1940, and then in December 1940 by a Commonwealth counteroffensive, **Operation Compass**. During Operation Compass, the Italian 10th Army was destroyed and the German Afrika Korps—commanded by **Erwin Rommel**, who later became known as "The Desert Fox"—was dispatched to North Africa during Operation Sonnenblume to reinforce Italian forces and prevent a complete Axis defeat.

A series of battles for control of Libya and parts of Egypt followed, reaching a climax in the **Second Battle of El Alamein** in 1942 when British

Commonwealth forces delivered a decisive defeat to the Axis forces and pushed them back to Tunisia. After the Allied Operation Torch landings in Northwest Africa in late 1942 and subsequent battles against Vichy France forces (who then changed sides), the Allies finally encircled Axis forces in northern Tunisia and forced their surrender.

Operation Torch in November 1942 was a compromise operation that met the British objective of securing victory in North Africa while allowing American armed forces the opportunity to engage in the fight against Nazi Germany on a limited scale. In addition, as Joseph Stalin, the leader of the Soviet Union, had long been demanding a second front be opened to engage the Wehrmacht and relieve pressure on the Red Army, it provided some degree of relief for the Red Army on the Eastern Front by diverting Axis forces to the African Theater, tying them up and destroying them there.

MEDITERRANEAN THEATER

After the defeat of the Axis Powers in North Africa in May 1943, there was disagreement between the Allies as to what the next step should be. British Prime Minister Winston Churchill wanted to invade Italy, which in November 1942 he called “the soft underbelly of the axis” (and General Mark Clark, in contrast, later called “one tough gut”). Popular support in Italy for the war was declining, and he believed an invasion would remove Italy and thus the influence of Axis forces in the Mediterranean Sea, opening it to Allied traffic. This would reduce the shipping capacity needed to supply Allied forces in the Middle East and Far East at a time when the disposal of Allied shipping capacity was in crisis and increase British and American supplies to the Soviet Union. In addition, it would tie down German forces. Joseph Stalin, the Soviet leader, had been pressing Churchill and Roosevelt to open a “second front” in Europe, which would lessen the German Army’s focus on the Eastern Front where the bulk of its forces were fighting in the largest armed conflict in history.

Deception

To distract the Axis and possibly divert some of their forces to other areas, the Allies engaged in several deception operations. The most famous and successful of these was “**Operation Mincemeat.**” The British allowed a corpse disguised as a British

Royal Marines officer to drift ashore in Spain carrying a briefcase containing fake secret correspondence that purported to reveal that the Allies were planning to invade Greece and Sardinia, with invasion of Sicily merely the object of a ruse. German intelligence accepted the authenticity of the documents, and the Germans diverted much of their defensive effort from Sicily to Greece until the occupation of Pantellaria on June 11, which concentrated German and Italian attention on the western Mediterranean. Rommel was sent to Greece to assume command. The Germans transferred a group of “R boats” (German minesweepers and minelayers) from Sicily and laid three additional minefields off the Greek coast. They also moved three panzer divisions to Greece, one from France and two from the Eastern Front, which reduced German combat strength in the Kursk salient.

Invasion of Sicily

The Allied invasion of Sicily, code named **Operation Husky**, was a major campaign in which the Allies took the island of Sicily from the Axis powers (Italy and Nazi Germany). It was a large amphibious and airborne operation followed by a six-week land campaign and began the Italian Campaign.

Husky began on the night of July 9-10, 1943, and ended on August 17. A combined British-Canadian-Indian-American invasion of Sicily began on July 10, 1943, with both amphibious and airborne landings at the Gulf of Gela (the US Seventh Army under **George S. Patton**) and north of Syracuse (the British Eighth Army under **Bernard Montgomery**). The original plan contemplated a strong advance by the British northwards along the east coast to Messina, with the Americans in a supporting role along their left flank. When the Eighth Army were held up by stubborn defenses in the rugged hills south of Mount Etna, Patton amplified the American role by a wide advance northwest toward Palermo and then directly north to cut the northern coastal road. This was followed by an eastward advance north of Etna towards Messina, supported by a series of amphibious landings on the north coast, that propelled Patton’s troops into Messina shortly before the first elements of Eighth Army. The defending German and Italian forces were unable to prevent the Allied capture of the island but succeeded in evacuating most of their troops to the mainland, the last leaving on August 17, 1943. Allied forces gained experience in opposed amphibious

operations, coalition warfare, and mass airborne drops.

Strategically, Husky achieved the goals set out for it by Allied planners; the Allies drove Axis air, land, and naval forces from the island and the Mediterranean sea lanes were opened for Allied merchant ships for the first time since 1941. Italian fascist leader Benito Mussolini was toppled from power, opening the way for the invasion of Italy. Hitler canceled a major offensive at Kursk after only a week, in part to divert forces to Italy, resulting in a reduction of German strength on the Eastern Front.

Italian Campaign

After the successful invasion of Sicily, forces of the British Eighth Army, still under Montgomery, landed in the “toe” of Italy on September 3, 1943, the day the Italian government agreed to an armistice with the Allies. The armistice was publicly announced on September 8. Although the German forces prepared to defend without Italian assistance, only two of their divisions opposite the Eighth Army and one at Salerno were not tied up disarming the Italian Army.

On September 9, forces of the US Fifth Army, expecting little resistance, landed against heavy German resistance at Salerno in Operation Avalanche; in addition, British forces landed at Taranto in Operation Slapstick, which was almost unopposed. There had been a hope that with the surrender of the Italian government, the Germans would withdraw to the north, since at the time Hitler had been persuaded that southern Italy was strategically unimportant. However, this was not to be, though the Eighth Army was able to make relatively easy progress up the eastern coast, capturing the port of Bari and the important airfields around Foggia.

The American forces took possession of Rome on June 4, 1944. The German Tenth Army was allowed to get away and in the next few weeks were responsible for doubling the Allied casualties of the previous few months.

The Allies’ final offensive commenced with massive aerial and artillery bombardments on April 9, 1945. By April 18, Eighth Army forces in the east had broken through the Argenta Gap and sent armor racing forward in an encircling move to meet the US IV Corps advancing from the Apennines in Central Italy and trap the remaining defenders of Bologna.

As April came to an end, Army Group C, the Axis

forces in Italy, was retreating on all fronts and had lost most of its fighting strength, left with little option but surrender. General Heinrich von Vietinghoff signed the instrument of surrender on behalf of the German armies in Italy on April 29, formally bringing hostilities to an end on May 2, 1945.



American 8th Air Force Boeing B-17 *Flying Fortress* bombing raid on the Focke-Wulf factory in Germany, 9 October 1943

Tehran Conference

The **Tehran Conference** (code named Eureka) was a strategy meeting of Joseph Stalin, Franklin D. Roosevelt, and Winston Churchill from November 28 to December 1, 1943. It was held in the Soviet Union’s embassy in Tehran, Iran and was the first World War II conference of the “Big Three” Allied leaders (the Soviet Union, the United States, and the United Kingdom).



The Allied leaders of the European theatre (left to right): Joseph Stalin, Franklin D. Roosevelt, and Winston Churchill meeting at the Tehran Conference in 1943. US Signal Corps photo

It closely followed the Cairo Conference which took place on November 22-26, 1943, and preceded the 1945 Yalta and Potsdam conferences. Although the three leaders arrived with differing objectives, the main outcome of the Tehran Conference was the Western Allies’ commitment to open a second front against Nazi Germany. The conference also addressed the Allies’ relations with Turkey and Iran, operations in Yugoslavia and against Japan, and the envisaged post-war settlement. A separate protocol signed at the conference pledged the Big Three to recognize Iran’s independence.

The Artios Home Companion Series

Unit 20: War's End and Start of the Cold War Era

Teacher Overview

THE WESTERN ALLIES of World War II launched the largest amphibious invasion in history when they assaulted Normandy, located on the northern coast of France, on June 6, 1944. By the time the Allied forces launched an invasion of Germany from the Western and Eastern front, Allied victory in Europe was inevitable. Having gambled his future ability to defend Germany on the Ardennes offensive and lost, Hitler had no strength left to stop the powerful Allied armies. In early April, the Western Allies finally pushed forward in Italy and swept across western Germany, while Soviet and Polish forces stormed Berlin in late April. On April 30, 1945, the Reichstag was captured, signaling the military defeat of Nazi Germany. On that same day, Hitler committed suicide. As the Allies advanced on Germany, they began to discover the extent of the Holocaust and liberated many concentration camps along their route. In August, the US dropped atomic bombs on Hiroshima and Nagasaki, and on September 2, Japan signed the instrument of surrender, effectively ending World War II. The world was not to know peace for long, however, because the first phase of the Cold War began soon afterward.



Polish prisoners in Dachau toast their liberation from the camp. Poles constituted the largest ethnic group in the camp during the war, followed by Russians, French, Yugoslavs, Jews, and Czechs.

Suggested Assignments

In this unit, students will:

- Complete five lessons in which they will learn about the **end of World War II** and the **start of the Cold War**, journaling as they read.
- Instead of using discussion questions, this unit will focus on note-taking skills in an outline format.
- EITHER find a **WWII veteran** to interview or listen to an interview with a WWII vet and create a presentation sharing highlights from that interview (this can be film footage, a PowerPoint show, or a speech), OR prepare a paper or presentation on the legal influence of the **Nuremberg Trials** upon international law regarding genocide and other crimes against humanity.
- Complete their **timeline**, complete with pictures that they find online, that records events and policies leading up to and during World War II.
- Define vocabulary words.
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

The Bible talks about our need to make ourselves ready for spiritual warfare, like the world's nations took steps to prepare to enter World War II.

Put on the whole armor of God, that you may be able to stand against the schemes of the devil. For we do not wrestle against flesh and blood, but against the rulers, against the authorities, against the cosmic powers over this present darkness, against the spiritual forces of evil in the heavenly places. Therefore take up the whole armor of God, that you may be able to withstand in the evil day, and having done all, to stand firm. Stand therefore, having fastened on the belt of truth, and having put on the breastplate of righteousness, and, as shoes for your feet, having put on the readiness given by the gospel of peace. In all circumstances take up the shield of faith, with which you can extinguish all the flaming darts of the evil one; and take the helmet of salvation, and the sword of the Spirit, which is the word of God.

– Ephesians 6:11-17

God's Word tells us there will be times for both war and peace.

A time to love, and a time to hate; a time for war, and a time for peace.

– Ecclesiastes 3:8

“The only thing necessary for the triumph of evil is for good men to do nothing.” – Edmund Burke

When the righteous increase, the people rejoice: but when the wicked rule, the people groan.

– Proverbs 29:2

Lesson One

History Overview and Assignments War's End, Part One

THE ALLIES were able to establish a beachhead after their successful “D-Day” invasion of Nazi-occupied France, and they soon swept through Europe. On April 30, 1945, the Reichstag was captured, signaling the military defeat of Nazi Germany. At the Yalta Conference the heads of government of the United States, the United Kingdom, and the Soviet Union met to discuss Europe's post-war reorganization. The war in Europe concluded with an invasion of Germany by the Western Allies and the Soviet Union, culminating in the capture of Berlin by Soviet and Polish troops and the subsequent German unconditional surrender on May 8, 1945.



Hitler's refusal to surrender to the Allies led to Operation Overlord on June 6, 1944. British, Canadian, and American forces managed to take key points on the coast of Nazi-occupied France, signaling a beginning to the end of war in Europe.

Key People, Places, and Events

- D-Day
- Invasion of Normandy
- Yalta Conference
- Franklin D. Roosevelt
- Winston Churchill
- Joseph Stalin
- Harry S. Truman
- Battle of Berlin
- Victory in Europe/V-E Day
- Auschwitz
- Buchenwald
- Bergen-Belsen
- Ravensbrück

Suggested Reading and Assignments

- Review the discussion questions then read the article: *The End of the War, Part One*.
- Narrate about today's reading using the appropriate notebook page. Be sure to include key people, events, and dates within the narration.
- For each heading listed in each article, create an outline showing the main points made by the author. Use the website found on your **ArtiosHCS** curriculum website on how to write an outline.
- Continue your **timeline**, complete with pictures that you find online, that record events and policies leading up to and during World War II.
- EITHER find a **WWII veteran** to interview or listen to an interview with a WWII vet and create a presentation sharing highlights from that interview (this can be film footage, a PowerPoint show, or a speech), OR prepare a paper or presentation on the legal influence of the **Nuremberg Trials** upon international law regarding genocide and other crimes against humanity.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Adapted for High School from:

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The End of the War, Part One

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D-DAY: THE NORMANDY LANDINGS

The Normandy landings (code named Operation Neptune) on Tuesday, June 6, 1944, (termed **D-Day**) were the Allied **Invasion of Normandy** in Operation Overlord during World War II. The largest seaborne invasion in history, the operation began the liberation of German-occupied northwestern Europe from Nazi control and contributed to the Allied victory on the Western Front.

Planning for the operation began in 1943. In the months leading up to the invasion, the Allies conducted a substantial military deception, code named Operation Bodyguard, to mislead the Germans as to the date and location of the main Allied landings. The weather on D-Day was far from ideal, but postponing would have meant a delay of at least two weeks as the invasion planners had requirements for the phase of the moon, the tides, and the time of day that meant only a few days in each month were suitable. Adolf Hitler placed German Field Marshal Erwin Rommel in command of German forces and of developing fortifications along the Atlantic Wall in anticipation of an Allied invasion.

The amphibious landings were preceded by extensive aerial and naval bombardment and an airborne assault—the landing of 24,000 American, British, and Canadian airborne troops shortly after midnight. Allied infantry and armored divisions began landing on the coast of France at 06:30. The

target 50-mile stretch of the Normandy coast was divided into five sectors: Utah, Omaha, Gold, Juno, and Sword. Strong winds blew the landing craft east of their intended positions, particularly at Utah and Omaha. The men landed under heavy fire from gun emplacements overlooking the beaches, and the shore was mined and covered with obstacles such as wooden stakes, metal tripods, and barbed wire, making the work of the beach-clearing teams difficult and dangerous. Casualties were heaviest at Omaha, with its high cliffs. At Gold, Juno, and Sword, several fortified towns were cleared in house-to-house fighting, and two major gun emplacements at Gold were disabled using specialized tanks.

The Allies failed to achieve any of their goals on the first day. Carentan, St. Lô, and Bayeux remained in German hands, and Caen, a major objective, was not captured until July 21. Only two of the beaches (Juno and Gold) were linked on the first day, and all five beachheads were not connected until June 12; however, the operation gained a foothold which the Allies gradually expanded over the coming months. German casualties on D-Day have been estimated at 4,000 to 9,000 men. Allied casualties were at least 10,000, with 4,414 confirmed dead. Museums, memorials, and war cemeteries in the area now host many visitors each year.

Assessment and Significance

The Normandy landings were the first successful opposed landings across the English Channel in over eight centuries. They were costly in terms of men, but

the defeat inflicted on the Germans was one of the largest of the war. Strategically, the campaign led to the loss of the German position in most of France and the secure establishment of a new major front. In larger context, the Normandy landings helped the Soviets on the Eastern Front, who were facing the bulk of the German forces and to a certain extent contributed to the shortening of the conflict there.

Despite initial heavy losses in the assault phase, Allied morale remained high. Casualty rates among all the armies were tremendous, and the Commonwealth forces had to use a recently created category—Double Intense—to describe them.

The Allied Push to Berlin

On December 16, 1944, Germany made a last attempt on the Western Front by using most of its remaining reserves to launch a massive counter-offensive in the Ardennes to split the Western Allies, encircle large portions of Western Allied troops, and capture their primary supply port at Antwerp to prompt a political settlement. By January, the offensive was repulsed with no strategic objectives fulfilled. In Italy, the Western Allies remained stalemated at the German defensive line. In mid-January 1945, the Soviets and Poles attacked in Poland, pushing from the Vistula to the Oder River in Germany, and overran East Prussia.

THE YALTA CONFERENCE

The **Yalta Conference** was held from February 4 to 11, 1945. This World War II meeting comprised the heads of government of the United States, the United Kingdom, and the Soviet Union, represented by President **Franklin D. Roosevelt**, Prime Minister **Winston Churchill**, and Premier **Joseph Stalin**, respectively, to discuss Europe's post-war reorganization. The conference convened in the Livadia Palace near Yalta in Crimea.

All three leaders attempted to establish an agenda for governing post-war Europe and keeping peace between post-war countries. On the Eastern Front, the front line at the end of December 1943 remained in the Soviet Union but by August 1944, Soviet forces were inside Poland and Romania as part of their drive west. By the time of the conference, Red Army Marshal Georgy Zhukov's forces were 40 miles from Berlin. Stalin felt his position at the conference was so strong that he could dictate terms. According to US delegation member and future Secretary of State James F.

Byrnes, "It was not a question of what we would let the Russians do, but what we could get the Russians to do."

Each leader had an agenda for the Yalta Conference: Roosevelt wanted Soviet support in the US Pacific War against Japan, specifically for the planned invasion of Japan (Operation August Storm), as well as Soviet participation in the UN; Churchill pressed for free elections and democratic governments in Eastern and Central Europe (specifically Poland); and Stalin demanded a Soviet sphere of political influence in Eastern and Central Europe, an essential aspect of the USSR's national security strategy.

Key Results

The key results from the meeting were as follows:

- Agreement on the priority of the unconditional surrender of Nazi Germany. After the war, Germany and Berlin would be split into four occupied zones.
- Stalin agreed that France would have a fourth occupation zone in Germany that would be formed out of the American and British zones.
- Germany would undergo demilitarization and denazification.
- German reparations were partly to be in the form of forced labor to repair damage that Germany had inflicted on its victims.
- Creation of a reparation council located in the Soviet Union.
- The Polish eastern border would follow the Curzon Line, and Poland would receive territorial compensation in the west from Germany.
- Stalin pledged to permit free elections in Poland.
- Citizens of the Soviet Union and Yugoslavia were to be handed over to their respective countries, regardless of their consent.
- Roosevelt obtained a commitment by Stalin to participate in the UN.
- Stalin requested that all of the 16 Soviet Socialist Republics would be granted UN membership. This was taken into consideration, but 14 republics were denied.
- Stalin agreed to enter the fight against the Empire of Japan.
- Nazi war criminals were to be found and put on trial.
- A "Committee on Dismemberment of Germany" was to be set up to decide whether Germany would be divided into six nations.

THE ALLIES CLOSE IN

At about the same time as the conference, the Soviets entered Silesia and Pomerania, while Western Allies entered western Germany and closed to the Rhine River. By March, the Western Allies crossed the Rhine north and south of the Ruhr, encircling the German Army Group B, while the Soviets advanced to Vienna. In early April, the Western Allies finally pushed forward in Italy and swept across western Germany, while Soviet and Polish forces stormed Berlin in late April. American and Soviet forces joined on Elbe River on April 25. On April 30, 1945, the Reichstag was captured, signaling the military defeat of Nazi Germany.

Several changes in leadership occurred during this period. On April 12, President Roosevelt died and was succeeded by **Harry S. Truman**. Benito Mussolini was killed by Italian partisans on April 28. Two days later, as the **Battle of Berlin** raged above him, realizing that all was lost and not wishing to suffer Mussolini's fate, German dictator Adolf Hitler committed suicide in his *Führerbunker* along with Eva Braun, his long-term partner whom he'd married less than 40 hours before their joint suicide. In his will, Hitler dismissed Reichsmarschall Hermann Göring, his second-in-command, and Interior minister Heinrich Himmler after each of them separately tried to seize control of the crumbling Third Reich. Hitler appointed his successors as follows; Großadmiral Karl Dönitz as the new *Reichspräsident* ("President of Germany") and Joseph Goebbels as the new *Reichskanzler* (Chancellor of Germany). However, Goebbels committed suicide the following day, leaving Dönitz as the sole leader of Germany.

German forces surrendered in Italy on April 29. Total and unconditional surrender was signed on May 7 to be effective by the end of May 8 (which became **Victory in Europe**, or **V-E Day**). German Army Group Centre resisted in Prague until May 11.

At the end of the war, millions of people were homeless, the European economy had collapsed, and much of the European industrial infrastructure had been destroyed.

Liberation of Concentration Camps

As the Allies advanced on Germany, they began to uncover the extent of the Holocaust. The first major camp to be encountered by Allied troops, Majdanek, was discovered by the advancing Soviets on July 23, 1944. Chelmno was liberated by the Soviets on January 20, 1945. **Auschwitz** was liberated, also by the Soviets, on January 27, 1945; **Buchenwald** by the Americans on April 11; **Bergen-Belsen** by the British on April 15; Dachau by the Americans on April 29; **Ravensbrück** by the Soviets on the same day; Mauthausen by the Americans on May 5; and Theresienstadt by the Soviets on May 8. Treblinka, Sobibór, and Belzec were never liberated, but were destroyed by the Nazis in 1943. Colonel William W. Quinn of the US Seventh Army said of Dachau: "There our troops found sights, sounds, and stenches horrible beyond belief, cruelties so enormous as to be incomprehensible to the normal mind."



Young survivors at Auschwitz, liberated by the Red Army in January 1945

In most of the camps discovered by the Soviets, almost all the prisoners had already been removed, leaving only a few thousand alive—7,600 inmates were found in Auschwitz, including 180 children who had been experimented on by doctors. Some 60,000 prisoners were discovered at Bergen-Belsen by the British 11th Armoured Division, 13,000 corpses lay unburied, and another 10,000 died from typhus or malnutrition over the following weeks. The British forced the remaining SS guards to gather up the corpses and place them in mass graves.

Lesson Two

History Overview and Assignments War's End, Part Two

THE TRUMAN PRESIDENCY was characterized by an internationalist foreign policy, the Cold War, and domestic unrest. Hard-fought battles on the Japanese home islands of Iwo Jima, Okinawa, and others resulted in horrific casualties on both sides but finally produced a Japanese defeat. In July 1945, Allied leaders met in Potsdam, Germany, where they confirmed earlier agreements about post-war Germany and reiterated the demand for unconditional surrender of all Japanese forces, specifically stating that “the alternative for Japan is prompt and utter destruction.” On August 6, 1945, the United States dropped an atomic bomb on the Japanese city of Hiroshima in the first nuclear attack in history. Three days later, on August 9, the US dropped another atomic bomb on Nagasaki, the last nuclear attack in history.



Key People, Places, and Events

Harry S. Truman
Battle of Iwo Jima
Battle of Okinawa
Douglas MacArthur
Chester Nimitz
Potsdam Conference
Manhattan Project
Hiroshima
Enola Gay
Nagasaki

Raising the Flag on Iwo Jima, by Joe Rosenthal, became the only photograph to win the Pulitzer Prize for Photography in the same year as its publication, and came to be regarded in the United States as one of the most significant and recognizable images of the war.

Suggested Reading and Assignments

- Review the discussion questions then read the article: *The End of the War, Part Two*.
- Narrate about today's reading using the appropriate notebook page. Be sure to and include key people, events, and dates within the narration.
- For each heading listed in each article, create an outline showing the main points made by the author. Use the website found on your **ArtiosHCS** curriculum website on how to write an outline.
- Continue to work on EITHER your presentation after finding a **WWII veteran** to interview or listening to an interview by a WWII vet OR your paper or presentation on the legal influence the **Nuremberg Trials** had upon international law regarding genocide and other crimes against humanity.
- Continue your **timeline**, complete with pictures that you find online, that record events and policies leading up to and during World War II.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

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Harry S. Truman's Administration ***Democratic: 1945-1953***

Harry S. Truman was the 33rd President of the United States (1945-53), an American politician of the Democratic Party. He served as a United States senator from Missouri (1935-45) and briefly as vice president (1945) before he succeeded to the presidency on April 12, 1945, upon the death of Franklin D. Roosevelt.

Harry Truman was president during the final months of World War II and then while America sought its path after the war and tensions with the Soviet Union increased, marking the start of the Cold War. He was unaware until he became president of the fact that there was a new type of Allied weapon under development called the atomic bomb, and that he would be faced with the terrible decision of whether to use it.

Iwo Jima

The **Battle of Iwo Jima** (Operation Detachment) in February 1945 was one of the bloodiest battles fought by the Americans in the Pacific War. Iwo Jima was an eight-square-mile island situated halfway between Tokyo and the Mariana Islands. Holland Smith, the commander of the invasion force, aimed to capture the island and use its three airfields as bases to carry out air attacks against the Home Islands. Lt. General Tadamichi Kuribayashi, the commander of the island's defense, knew that he could not win the battle but hoped to make the Americans suffer far more than they could endure.

From early 1944 until the days leading up to the invasion, Kuribayashi transformed the island into a massive network of bunkers, hidden guns, and 11 miles of underground tunnels. The heavy American naval and air bombardment did little but drive the Japanese further underground, making their positions impervious to enemy fire. Their pillboxes (small blockhouse guard posts equipped with holes for firing weapons) and bunkers were all connected so that if one was knocked out it could be occupied again. The network of bunkers and pillboxes greatly favored the defender.

Starting in mid-June 1944, Iwo Jima came under

sustained aerial bombardment and naval artillery fire. However, Kuribayashi's hidden guns and defenses survived the constant bombardment virtually unscathed. On February 19, 1945, some 30,000 men of the 3rd, 4th, and 5th Marine Divisions landed on the southeast coast of Iwo, just under Mount Suribachi, where most of the island's defenses were concentrated. For some time, they did not come under fire. This was part of Kuribayashi's plan to hold fire until the landing beaches were full. As soon as the Marines pushed inland to a line of enemy bunkers, they came under devastating machine gun and artillery fire which cut down many of the men. By the end of the day, the Marines reached the west coast of the island, but their losses were appalling— almost 2,000 men killed or wounded.

On February 23, the 28th Marine Regiment reached the summit of Suribachi, prompting the now famous Raising the Flag on Iwo Jima picture. Navy Secretary James Forrestal, upon seeing the flag, remarked "there will be a Marine Corps for the next 500 years." The flag raising is often cited as the most reproduced photograph of all time and became the archetypal representation not only of that battle, but of the entire Pacific War. For the rest of February, the Americans pushed north, and by March 1 had taken two-thirds of the island, but it was not until March 26 that the island was finally secured. The Japanese fought to the last man, killing 6,800 Marines and wounding nearly 20,000 more. The Japanese losses totaled well over 20,000 men killed, and only 1,083 prisoners were taken. Historians debate whether it was strategically worth the casualties sustained.

Okinawa

The **Battle of Okinawa**, code named Operation Iceberg, was a series of battles fought in the Japanese Ryukyu Islands, centered on the island of Okinawa. It included the largest amphibious assault in the Pacific War during World War II, the April 1, 1945 invasion of Okinawa itself. The 82-day-long battle lasted from April 1 until June 22, 1945. After a long campaign of island hopping, the Allies were approaching Japan and planned to use Okinawa, a large island only 340 miles away from

mainland Japan, as a base for air operations for the planned invasion of Honshu, the Japanese mainland. Four divisions of the US 10th Army (the 7th, 27th, 77th, and 96th) and two Marine Divisions (the 1st and 6th) fought on the island, supported by naval, amphibious, and tactical air forces.

The battle has been referred to as the “typhoon of steel” in English, and *tetsu no ame* (“rain of steel”) in Japanese. The nicknames refer to the ferocity of the fighting, the intensity of Japanese *kamikaze* attacks, and the sheer numbers of Allied ships and armored vehicles that assaulted the island. The battle was one of the bloodiest in the Pacific, with more than 82,000 direct casualties on both sides: 14,009 Allied deaths (over 12,500 Americans killed or missing) and 77,166 Japanese soldiers, excluding those who died from their injuries later. Some islands that saw major battles, such as Iwo Jima, were uninhabited or previously evacuated. Okinawa, by contrast, had a large indigenous civilian population. 42,000 to 150,000 local civilians were killed, committed suicide, or went missing, a significant proportion of the estimated prewar local population of 300,000.

As part of the naval operations surrounding the battle, the Japanese super-battleship *Yamato* was sunk and both sides lost considerable numbers of ships and aircraft. The military value of Okinawa “exceeded all hope.” After the battle, Okinawa provided a fleet anchorage, troop staging areas, and airfields in proximity to Japan in preparation for the planned invasion of Japan.

Island Hopping

Leapfrogging, also known as island hopping, was a military strategy employed by the Allies in the Pacific War against Japan and the Axis powers during World War II. The idea was to bypass heavily fortified Japanese positions and instead concentrate the limited Allied resources on strategically important islands that were not well-defended but were capable of supporting the drive to the main islands of Japan.

This strategy was possible in part because the Allies used submarine and air attacks to blockade and isolate Japanese bases, weakening their garrisons and reducing the Japanese ability to resupply and reinforce them. Thus, troops on islands which had been bypassed, such as the major base at Rabaul, were useless to the Japanese war effort and left to “wither on the vine.” General **Douglas MacArthur** supported this strategy in his effort to

regain the Philippines, and it was implemented in late 1943 in Operation Cartwheel. While MacArthur claimed to have invented the strategy, it initially came out of the Navy.

Leapfrogging had a number of advantages. It would allow the United States forces to reach Japan quickly and not expend the time, manpower, and supplies to capture every Japanese-held island on the way. It would give the Allies the advantage of surprise and keep the Japanese off balance. The overall leapfrogging strategy would involve two prongs. A force led by Admiral **Chester Nimitz**, with a smaller land force and larger fleet, would advance north towards the island and capture the Gilbert and Marshall Islands and the Marianas, going in the direction of the Bonin Islands. The southern prong, led by General MacArthur and with larger land forces, would take the Solomons, New Guinea, and the Bismarck Archipelago, advancing toward the Philippines.

POTSDAM CONFERENCE

The **Potsdam Conference** was held at Cecilienhof, the home of Crown Prince Wilhelm in Potsdam, occupied Germany, from July 17 to August 2, 1945. Participants were the Soviet Union, the United Kingdom, and the United States. The powers were represented by Communist Party General Secretary Joseph Stalin, Prime Ministers Winston Churchill and, later, Clement Attlee, and President Harry S. Truman.

Stalin, Churchill, and Truman—as well as Attlee, who participated alongside Churchill while awaiting the outcome of the 1945 general election and then became prime minister after the Labour Party’s defeat of the Conservatives—gathered to decide how to administer defeated Nazi Germany, which had agreed to unconditional surrender nine weeks earlier on May 8. The goals of the conference included the establishment of post-war order, peace treaty issues, and countering the effects of the war.

After the war, the Soviet Union converted the other countries of eastern Europe into Soviet Satellite states within the Eastern Bloc, such as the People’s Republic of Poland, the People’s Republic of Bulgaria, the People’s Republic of Hungary, the Czechoslovak Republic, the People’s Republic of Romania, and the People’s Republic of Albania. The Soviets later formed the puppet state of East Germany from the Soviet zone of German occupation.

BOMBING OF HIROSHIMA AND NAGASAKI

In the final year of the war, the Allies prepared for what was anticipated to be a very costly invasion of the Japanese mainland. This was preceded by a US firebombing campaign that destroyed 67 Japanese cities. The war in Europe concluded when Nazi Germany signed its instrument of surrender on May 8, 1945. The Japanese, facing the same fate, refused to accept the Allies' demands for unconditional surrender, and the Pacific War continued. Together with the United Kingdom and China, the United States called for the unconditional surrender of the Japanese armed forces in the Potsdam Declaration on July 26, 1945—the alternative being “prompt and utter destruction.” The Japanese responded to this ultimatum by ignoring it.

On July 16, 1945, the Allied weapon development program called the **Manhattan Project** successfully detonated an atomic bomb in the New Mexico desert, and by August had produced atomic weapons based on two alternate designs. The 509th Composite Group of the United States Army Air Forces (USAAF) was equipped with the specialized Silverplate version of the Boeing B-29 Superfortress, that could deliver them from Tinian in the Mariana Islands.

On August 6, the US dropped a uranium gun-type atomic bomb (“Little Boy”) on **Hiroshima**. Six planes of the 509th Composite Group participated in

this mission: one to carry the bomb (*Enola Gay*), one to take scientific measurements of the blast (*The Great Artiste*), the third to take photographs (*Necessary Evil*), while the others flew approximately an hour ahead to act as weather scouts. Bad weather would disqualify a target as the scientists insisted on visual delivery.

American President Harry S. Truman called for Japan's surrender 16 hours later, warning them to “expect a rain of ruin from the air, the like of which has never been seen on this earth.” Three days later, on August 9, the US dropped a plutonium implosion-type bomb (the Mark III, called the “Fat Man”) on **Nagasaki**. Within the first two to four months of the bombings, the acute effects of the atomic bombings killed 90,000–146,000 people in Hiroshima and 39,000–80,000 in Nagasaki; roughly half of the deaths in each city occurred on the first day. During the following months, large numbers died from the effect of burns, radiation sickness, and other injuries, compounded by illness and malnutrition. In both cities, most of the dead were civilians, although Hiroshima had a sizable military garrison.

On August 15, six days after the bombing of Nagasaki and the Soviet Union's declaration of war, Japan announced its surrender to the Allies. On September 2, it signed the instrument of surrender, effectively ending World War II.

The bombings' role in Japan's surrender and their ethical justification are still debated.

Lesson Three

History Overview and Assignments Aftermath, Part One

THE UNCONDITIONAL SURRENDER of Germany on May 8, 1945, and Japan on September 2, 1945, brought World War II to an end. Various documents and treaties placed stringent terms on Axis powers to prevent future hostilities. Some 75 million people died in World War II, including about 20 million military personnel and 40 million civilians, many of whom died because of deliberate genocide, massacres, mass-bombings, disease, and starvation.

Suggested Reading and Assignments

- Review the discussion questions then read the article: *Impact of World War II, Part One*.
- Narrate about today's reading using the appropriate notebook page. Be sure to and include key people, events, and dates within the narration.
- Define the vocabulary word in the context of the reading. Write the word and its definition in the vocabulary section of your history notebook.

- For each heading listed in each article, create an outline showing the main points made by the author. Use the website found on your **ArtiosHCS** curriculum website on how to write an outline.
- Continue to work on EITHER your presentation after finding a **WWII veteran** to interview or listening to an interview by a WWII vet OR your paper or presentation on the legal influence the **Nuremberg Trials** had upon international law regarding genocide and other crimes against humanity.
- Continue your **timeline**, complete with pictures that you find online, that record events and policies leading up to and during World War II.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.



Nuremberg Trials. Defendants in their dock, circa 1945-1946. In front row, from left to right: Hermann Göring, Rudolf Hess, Joachim von Ribbentrop, Wilhelm Keitel (in second row, from left to right): Karl Dönitz, Erich Raeder, Baldur von Schirach, Fritz Sauckel

Key People, Places, and Events

German Instrument of Surrender
Potsdam Declaration
Treaty of Peace With Italy

Vocabulary

jurisprudence

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Impact of World War II, Part One

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Surrender of Germany

The **German Instrument of Surrender** ended World War II in Europe. The definitive text was signed in Karlshorst, Berlin on the night of May 8, 1945 by representatives of the three armed services of the *Oberkommando der Wehrmacht* (OKW) and the Allied Expeditionary Force together with the Supreme High Command of the Red Army, with further French and US representatives signing as witnesses.

The agreed text was in three parts. The first consisted of a brief preamble “The German Government and German High Command, recognizing and acknowledging the complete defeat of the German armed forces on land, at sea and in the air, hereby announce Germany’s unconditional surrender.”

With the Potsdam agreement, signed on August

12, 1945, the Allied leaders planned the new post-war German government, resettled war territory boundaries, de facto annexed a quarter of prewar Germany situated east of the Oder-Neisse line, and mandated and organized the expulsion of the millions of Germans who remained in the annexed territories and elsewhere in the east. They also ordered German demilitarization, denazification, industrial disarmament, and settlements of war reparations.

Surrender of Japan

The surrender of Japan was announced by Imperial Japan on August 15 and formally signed on September 2, 1945, bringing the hostilities of World War II to a close.

The term for Japan’s surrender were decided at the Potsdam Conference. On July 26, 1945, the

United States, Britain, and China released the **Potsdam Declaration** announcing the terms for Japan's surrender, with the warning, "We will not deviate from them. There are no alternatives. We shall brook no delay."

Terms of Peace with Italy

The **Treaty of Peace With Italy** (one of the Paris Peace Treaties) was signed on February 10, 1947, between Italy and the victorious powers of World War II, formally ending hostilities. It came into general effect on September 15, 1947.

Articles 47 and 48 called for the demolition of all permanent fortifications along the Franco-Italian and Yugoslav-Italian frontier. Italy was banned from possessing, building, or experimenting with atomic weapons, guided missiles, guns with a range of over 30 km, non-contact naval mines and torpedoes as well as manned torpedoes (article 51).

The military of Italy was limited in size. Italy was allowed a maximum of 200 heavy and medium tanks (article 54). Former officers and non-commissioned officers of the Blackshirts and the National Republican Army were barred from becoming officers or non-commissioned officers in the Italian military (except those exonerated by the Italian courts, article 55).

The Italian navy was reduced. Some warships were awarded to the governments of the Soviet Union, the United States, the United Kingdom and France (articles 56 and 57). Italy was ordered to scuttle all its submarines (article 58) and banned from acquiring new battleships, submarines, and aircraft carriers (article 59). The Italian air force was limited to 200 fighters and reconnaissance aircraft plus 150 transport, air-rescue, training, and liaison aircraft, and was banned from owning and operating bomber aircraft (article 64). Article 17 of the treaty banned Fascist organizations ("whether political, military, or semi-military") in Italy.

Casualties and War Crimes

Estimates for the total number of casualties in the war vary because many deaths went unrecorded. Most suggest that some 75 million people died in the war, including about 20 million military personnel and 40 million civilians. Many civilians died because of deliberate genocide, massacres, mass-bombings, disease, and starvation.

The Soviet Union lost around 27 million people during the war, including 8.7 million military and 19 million civilian deaths. The largest portion of

military dead were 5.7 million ethnic Russians, followed by 1.3 million ethnic Ukrainians. A quarter of the people in the Soviet Union were wounded or killed. Germany sustained 5.3 million military losses, mostly on the Eastern Front and during the final battles in Germany.

Of the total number of deaths in World War II, approximately 85 percent—mostly Soviet and Chinese—were on the Allied side and 15 percent on the Axis side. Many deaths were caused by war crimes committed by German and Japanese forces in occupied territories. An estimated 11 to 17 million civilians died either as a direct or as an indirect result of Nazi ideological policies, including the systematic genocide of around 6 million Jews during the Holocaust and an additional 5 to 6 million ethnic Poles and other Slavs (including Ukrainians and Belarusians), Roma, homosexuals, and other ethnic and minority groups. Hundreds of thousands of ethnic Serbs, along with gypsies and Jews, were murdered by the Axis-aligned Croatian Ustaše in Yugoslavia, and retribution-related killings were committed just after the war ended.

In Asia and the Pacific, between 3 million and more than 10 million civilians, mostly Chinese (estimated at 7.5 million), were killed by the Japanese occupation forces. The best-known Japanese atrocity was the Nanking Massacre, in which 50 to 300 thousand Chinese civilians were raped and murdered.

Concentration Camps, Slave Labor, and Genocide

In addition to Nazi concentration camps, the Soviet gulags (labor camps) led to the death of citizens of occupied countries such as Poland, Lithuania, Latvia, and Estonia, as well as German prisoners of war (POWs) and Soviet citizens who were thought to be Nazi supporters. Of the 5.7 million Soviet POWs of the Germans, 57 percent died or were killed during the war, a total of 3.6 million. Soviet ex-POWs and repatriated civilians were treated with great suspicion as potential Nazi collaborators, and some were sent to the Gulag upon being checked by the NKVD.

Japanese POW camps, many of which were used as labor camps, also had high death rates. The International Military Tribunal for the Far East found the death rate of Western prisoners was 27.1 percent (for American POWs, 37 percent), seven times that of POWs under the Germans and Italians. While 37,583 prisoners from the UK, 28,500 from

the Netherlands, and 14,473 from the United States were released after the surrender of Japan, the number of Chinese released was only 56.

According to historian Zhifen Ju, at least five million Chinese civilians from northern China and Manchukuo were enslaved between 1935 and 1941 by the East Asia Development Board for work in mines and war industries. After 1942, the number reached 10 million.

Nuremberg Trials

After the war, a series of military tribunals were

held in Nuremberg, Germany, in which numerous prominent members of Nazi leadership were prosecuted for war crimes under international law. Between 1945 and 1949 a total of thirteen trials were held, in which Nazi officials and other professionals were indicted on charges of crimes against peace, war crimes, and crimes against humanity. In all, 199 defendants were tried, 161 were convicted, and 37 were sentenced to death.

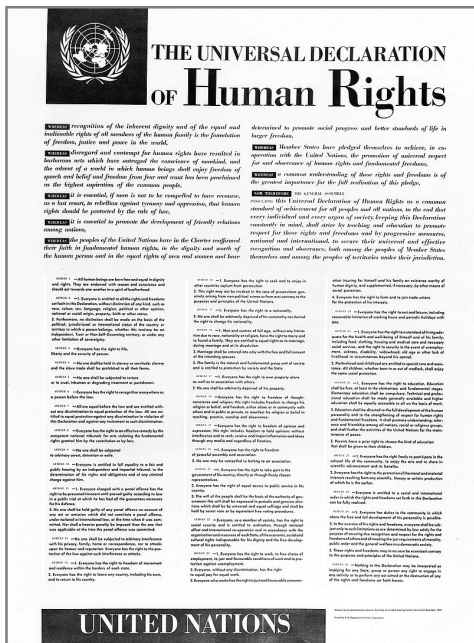
The trials marked a milestone in international **jurisprudence** and led to the creation of the International Criminal Court.

Lesson Four

History Overview and Assignments

Aftermath, Part Two

THE ATLANTIC CHARTER had set goals for the post-war world and inspired many of the international agreements that shaped the world thereafter, most notably the United Nations. The Universal Declaration of Human Rights was adopted by the United Nations General Assembly in 1948 in response to the barbarism of the war, to establish “rights of all members of the human family.” The war also brought about numerous social changes.



The Universal Declaration of Human Rights (1948)

Key People, Places, and Events

- Atlantic Charter
- Declaration by United Nations
- United Nations
- Mohandas Gandhi
- Universal Declaration of Human Rights
- Eleanor Roosevelt
- International Bill of Human Rights
- Jonas Salk
- polio vaccine
- Wernher von Braun
- Everson v. Board of Education*
- Tuskegee Airmen
- Executive Order 9981
- Navajo Code Breakers

Vocabulary

circumlocution

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the combined article: *Impact of World War II, Part Two and Social Effects of the War.*
- Narrate about today’s reading using the appropriate notebook page. Be sure to and include key people, events, and dates within the narration.

- Define the vocabulary word in the context of the reading. Write the word and its definition in the vocabulary section of your history notebook.
- For each heading listed in each article, create an outline showing the main points made by the author. Use the website found on your **ArtiosHCS** curriculum website on how to write an outline.
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Impact of World War II, Part Two

and

Social Effects of the War

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ATLANTIC CHARTER

The **Atlantic Charter** was a pivotal policy statement issued early during the war, on August 14, 1941, that had defined the Allied goals for the post-war world. The leaders of the United Kingdom and the United States drafted the work and all the Allies of World War II later confirmed it. The Charter stated the ideal goals of the war with eight principal points:

No territorial gains were to be sought by the United States or the United Kingdom.

Territorial adjustments must be in accord with the wishes of the peoples concerned.

All people had a right to self-determination.

Trade barriers were to be lowered.

There was to be global economic cooperation and advancement of social welfare.

The participants would work for a world free of want and fear.

The participants would work for freedom of the seas.

There was to be disarmament of aggressor nations, and a post-war common disarmament.

Adherents of the Atlantic Charter signed the **Declaration by United Nations** on January 1, 1942; it became the basis for the modern **United Nations**.

The Atlantic Charter made it clear that America was supporting Britain in the war. Both America and Britain wanted to present their unity, mutual principles, and hopes for the post-war world and the policies they agreed to follow once the Nazis had been defeated. A fundamental aim was to focus on the

peace that would follow and not specific American involvement and war strategy, although US involvement appeared increasingly likely.

The Atlantic Charter set goals for the post-war world and inspired many of the international agreements that shaped the world thereafter. The General Agreement on Tariffs and Trade (GATT), the post-war independence of European colonies, and many other key policies are derived from the Atlantic Charter.

Impact and Response

The public of Britain and the Commonwealth was delighted with the principles of the meetings but disappointed that the US was not entering the war. Churchill admitted that he had hoped the US would finally decide to commit itself. Regardless, the acknowledgement that all people had a right to self-determination gave hope to independence leaders in British colonies.

The Americans were insistent that the charter was to acknowledge that the war was being fought to ensure self-determination. The British were forced to agree to these aims, but in a September 1941 speech, Churchill stated that the Charter was only meant to apply to states under German occupation, and certainly not to the peoples who formed part of the British Empire.

Churchill rejected its universal applicability when it came to the self-determination of subject nations such as British India. Indian anti-colonial nationalist **Mohandas Gandhi** in 1942 wrote to President Roosevelt: "I venture to think that the Allied

declaration that the Allies are fighting to make the world safe for the freedom of the individual and for democracy sounds hollow so long as India and for that matter Africa are exploited by Great Britain.” Roosevelt repeatedly brought the need for Indian independence to Churchill’s attention but was rebuffed. However, Gandhi refused to help either the British or the American war effort against Germany and Japan in any way, and Roosevelt chose to back Churchill. India was already contributing significantly to the war effort, sending over 2.5 million men (the largest volunteer force in the world at the time) to fight for the Allies, mostly in West Asia and North Africa.

The Axis powers interpreted these diplomatic agreements as a potential alliance against them. In Tokyo, the Atlantic Charter rallied support for the militarists in the Japanese government, who pushed for a more aggressive approach against the US and Britain.

The British dropped millions of flyers over Germany to allay fears of a punitive peace that would destroy the German state. The text cited the Charter as the authoritative statement of the joint commitment of Great Britain and the US “not to admit any economical discrimination of those defeated” and promised that “Germany and the other states can again achieve enduring peace and prosperity.”

The most striking feature of the discussion was that an agreement had been made between a range of countries that held diverse opinions, who were accepting that internal policies were relevant to the international problem. The agreement proved to be one of the first steps towards the formation of the United Nations.

THE UNIVERSAL DECLARATION OF HUMAN RIGHTS

The **Universal Declaration of Human Rights** (UDHR) is a declaration adopted by the United Nations General Assembly after the war, on December 10, 1948, at the Palais de Chaillot, Paris. The Declaration arose directly from the experience of the Second World War and represents the first global expression of what many believe are the rights to which all human beings are inherently entitled. The UDHR urges member nations to promote a number of human, civil, economic, and social rights, asserting these rights are part of the “foundation of freedom, justice and peace in the world.” It aims to recognize “the inherent dignity and the equal and inalienable

rights of all members of the human family as the foundation of freedom, justice and peace in the world.” The full text is published by the United Nations on its website.

The UDHR was framed by members of the Human Rights Commission, with **Eleanor Roosevelt** as Chair, who began to discuss an International Bill of Rights in 1947. The members of the Commission did not immediately agree on the form of such a bill of rights and whether or how it should be enforced.

The Declaration consists of 30 articles which, although not legally binding, have been elaborated in subsequent international treaties, economic transfers, regional human rights instruments, national constitutions, and other laws. The **International Bill of Human Rights** consists of the Universal Declaration of Human Rights, the International Covenant on Economic, Social and Cultural Rights, and the International Covenant on Civil and Political Rights and its two Optional Protocols. In 1966, the General Assembly adopted the two detailed Covenants, which complete the International Bill of Human Rights. In 1976, after the Covenants had been ratified by a sufficient number of individual nations, the Bill became an international law.

POSTWAR ADVANCEMENTS

World War II precipitated numerous cultural advancements in the US. The years immediately following World War II witnessed stability and prosperity for many Americans. Increasing numbers of workers enjoyed high wages, larger houses, better schools, more automobiles, and home comforts like vacuum cleaners and washing machines, which were made for labor-saving and to make housework easier. Inventions familiar in the early 21st century made their first appearance during this era.

Medical Sciences

Outbreaks of polio, a serious infectious disease that can cause deformity, paralysis, and death, had reached pandemic proportions in Europe and North America during the first half of the twentieth century. In 1948, **Jonas Salk** undertook a project funded by the National Foundation for Infantile Paralysis to determine the number of different types of polio virus. Salk saw an opportunity to extend this project toward developing a **polio vaccine** and, together with the skilled research team he assembled, devoted himself to this work for the next 7 years. Over 1.8 million

schoolchildren took part in the trial. When news of the vaccine's success was made public on April 12, 1955, Salk was hailed as a miracle worker and the day nearly became a national holiday. Around the world, an immediate rush to vaccinate began.

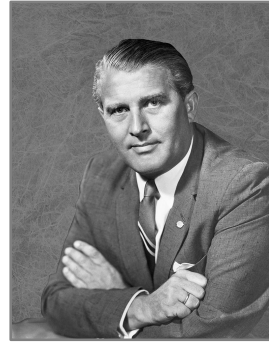
New technologies also revolutionized surgery procedures. The first successful surgery providing mechanical support to heart function was performed in 1952 using a machine co-developed with General Motors. The first successful open heart procedure on a human, utilizing the heart-lung machine, was performed in 1953 in Philadelphia. The machine was further developed into a reliable instrument by a surgical team led in Rochester, Minnesota in the mid-1950s. In 1954 the world's first successful renal transplant was performed between identical twins in Boston.

Biotechnology also underwent rapid development. The belief that the needs of an industrial society could be met by fermenting agricultural waste was an important ingredient of the "chemurgic movement." Fermentation-based processes generated products of continually increasing utility; in the 1940s, penicillin was the most impactful of these. While it was discovered in England, it was produced industrially in the United States. The enormous profits and the public expectations penicillin engendered caused a radical shift in the standing of the pharmaceutical industry.

Early Space Race

The Space Race can trace its origins to Germany, beginning in the 1930s and continuing during World War II when Nazi Germany researched and built operational ballistic missiles. At the close of World II, both the US and Russian forces recruited or smuggled top German scientists such as **Wernher von Braun** to their respective countries to continue defense-related work. Von Braun and his team were sent to the US Army's White Sands Proving Ground, in New Mexico, in 1945. They set about assembling the captured V2s and began a program of launching them and instructing US engineers in their operation. These tests led to the first rocket to take photos from outer space, and the first two-stage rocket, the WAC Corporal-V2 combination, in 1949. The German rocket team was moved from Fort Bliss to the Army's new Redstone Arsenal, in Huntsville, Alabama, in 1950. From here, von Braun and his team developed the Army's first operational medium-range ballistic missile, the Redstone rocket, that in slightly modified versions launched both the United States' first

satellite and the first piloted Mercury space missions. It became the basis for both the Jupiter and Saturn family of rockets.



Wernher von Braun

Education, Industry, and Employment

The Servicemen's Readjustment Act of 1944, commonly known as the **G.I. Bill**, offered returning World War II veterans important benefits that had a great impact on socioeconomic changes in the postwar era. Benefits included low-cost mortgages, low-interest loans to start a business, cash payments of tuition and living expenses to attend university, high school or vocational education, as well as one year of unemployment compensation. By the end of the program in 1956, roughly 2.2 million veterans had used the GI Bill education benefits to attend colleges or universities. An additional 5.6 million used these benefits for vocational training programs.

The postwar years were also noted for the rise of the automotive and aviation industries. Many wartime industries continued to conduct business following World War II, driving innovation in newer industries such as aerospace and manufacturing. As companies grew in size, jobs, factory production, and consumer spending rose with it. Between 1946 and 1960, the United States saw greatly increased consumption of goods and services. Gross national product rose by 36% and personal consumption expenditures by 42%, with cumulative gains reflected in income. The period from 1946 to 1960 also saw a substantial increase in paid leisure time of working people. The 40-hour workweek established by the 1938 Fair Labor Standards Act in covered industries gradually became the actual schedule in most workplaces. The majority of workers also enjoyed paid vacations, and industries catering to leisure activities blossomed.

Working Women

The domestic war effort had swept millions of women into the workforce, and roles of women in

society changed during the years afterward. Women had taken on a variety of roles during World War II. Some had embraced the traditional positions of caretakers and homemakers. Others explored new opportunities, from which women had been previously excluded. The global conflict on an unprecedented scale and the absolute urgency of mobilizing the entire population made the expansion of the role of women inevitable. In the United States, the hard skilled labor of women was symbolized by the concept of “Rosie the Riveter,” a female factory laborer performing what was previously considered men’s work.



Cover of the published music to the song *Rosie the Riveter* (1942)

Although many women took on male-dominated trades during World War II, they largely returned home once men returned from the war. In 1944, when victory seemed assured for the United States, government-sponsored propaganda changed by urging women to return to working in the home.

Later, many women assumed traditional female-dominated jobs such as clerical positions, despite women’s reluctance to reenter the lower-paying fields. At the end of the war, most of the munitions-production jobs ended. Many factories were closed, while others were retooled for civilian production. In some jobs, women were replaced by returning veterans. However, the number of women at work in 1946 was 87% of the number in 1944, leaving 13% who had lost or quit their jobs. The overall percentage of women working fell from 36% to 28% in 1947.

Suburban Shift

As economic prosperity empowered couples who had postponed marriage and parenthood, the birth rate started shooting up in 1941, paused in 1944-1945 (with 12 million American men in service), and then continued to soar until reaching a peak in the late 1950s (the postwar “baby boom”). However, housing shortages, especially in the munitions centers, forced

millions of couples to live with parents or in makeshift facilities. Little housing had been built in the Depression years, so the shortages grew steadily worse until about 1948, when a massive housing boom finally caught up with demand.

Organized Religion

As the birth rate soared and more people moved to the suburbs, the United States witnessed a subsequent boom in affiliation with organized religion, especially involving various Protestant churches. Between 1950 and 1960, church membership among Americans increased from 49% to 69%.

As the resurgence of religion continued in the United States, a number of landmark Supreme Court cases addressed the issue of separation of church and state. The centrality of the separation concept to the Religion Clauses of the Constitution was made explicit in *Everson v. Board of Education* (1947), a case that dealt with a New Jersey statute that allowed government funds to be used for transportation to religious-oriented schools. This was the first case in which the Court applied the Establishment Clause to state law, having interpreted the due process clause of the Fourteenth Amendment as applying the Bill of Rights to the states as well as the federal legislature. In affirming the judgment of the Court of Appeals, the Supreme Court found the NJ statute was not unconstitutional, because it was designed to provide a benefit to the parents of all school children, distinct from any religious function in which the children engaged.¹

Minority Recognition

Despite racism and segregation in the US military, more than two and a half million African American men had registered in the military draft, with more than 1 million serving in the armed forces during World War II, and African American women volunteered their services. However, the US military was still heavily segregated.

The **Tuskegee Airmen** were the first African American military aviators in the US Armed Forces. Officially, they formed the 332nd Fighter Group and the 477th Bombardment Group of the US Army Air Forces. The Tuskegee Airmen were subjected to discrimination, both within and outside the army. All African American military pilots who trained in the United States trained at Moton Field, the Tuskegee Army Airfield, and were educated at Tuskegee University, located near Tuskegee, Alabama. The

name also applies to the navigators, bombardiers, mechanics, instructors, crew chiefs, nurses, cooks, and other support personnel for the pilots. In June 1941, President Franklin D. Roosevelt had signed the Executive Order 8802, which prohibited racial discrimination in the national defense industry, and in July 1948, President Truman's **Executive Order 9981** abolished racial discrimination in all the armed forces and eventually led to the end of segregation in the services.



Eight Tuskegee Airmen in front of a P-40 fighter aircraft

Hundreds of thousands of Hispanic-American men and women also served in the US Armed Forces and on the home front, as well as some 44,000 Native Americans, which was one-third of all able-bodied Native American men. Hispanic Americans fought in every major battle of World War II in which the armed forces of the United States were involved, and more than 30 Native Americans were awarded the Distinguished Flying Cross, the third-highest aviation honor.

In February 1942, a white civil engineer named Philip Johnston came up with the idea of using the Navajo language as military code. Johnston, a missionaries' son, grew up on a reservation and understood the complexities of the Navajo language. In early 1942, Johnston met with the commanding general of the Amphibious Corps and staged simulated combat conditions, in which he demonstrated that Navajo men could transmit and decode a three-line message in 20 seconds, compared to the 30 minutes it took the deciphering machines of the time. By September 1942, the American government had recruited several hundred Native Americans who spoke both Navajo and English to translate English words into the Navajo language to avoid enemy interception. The code that these Navajo

developed remains the only oral military code to never have been broken by an enemy.



Navajo code talkers, Saipan, June 1944. After incidents in which Navajo code talkers were mistaken for ethnic Japanese and were captured by other American soldiers, several were assigned a personal bodyguard whose principal duty was to protect them from their own side.

The Navajo code talkers were lauded for the speed and accuracy of their military communications. During the Battle of Iwo Jima, the Marine Division signal officer had six Navajo code talkers working around the clock during the first two days of the battle. These six sent and received more than 800 messages, all without error. The signal officer later said, "Were it not for the Navajos, the Marines would never have taken Iwo Jima."²

The code itself was composed of carefully selected Navajo words that used poetic **circumlocution** so that even a Navajo speaker would not be able to understand the commands without proper training. In 2001, the 28 members of the **Navajo Code Breakers** were awarded a Congressional Gold Medal, mostly posthumously.

While the term "code talkers" is strongly associated with the bilingual Navajo speakers, code talking had been pioneered by Cherokee and Choctaw Native Americans during World War I. Other Native American code talkers were deployed by the United States Army during World War II, including Lakota, Meskwaki, and Comanche soldiers.



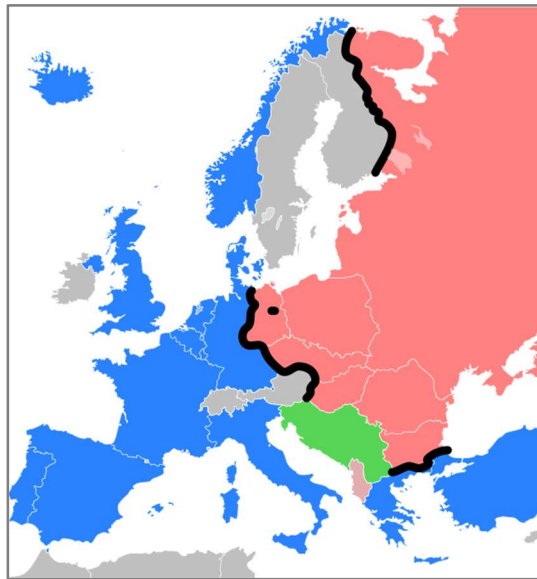
Choctaw soldiers in training for coded radio and telephone transmissions

Source: <https://www.casebriefs.com/blog/law/constitutional-law/constitutional-law-keyed-to-cohen/religion-and-the-constitution/everson-v-board-of-education/>
 "Navajo Code Talkers: World War II Fact Sheet," Naval Historical Center, September 17, 1992. Archived from the original on November 4, 2017. Retrieved March 12, 2014.

Lesson Five

History Overview and Assignments Beginning of the Cold War

AT THE END OF World War II, millions of Europeans were homeless, their economy had collapsed, and much of the continent's industrial infrastructure had been destroyed. In February 1946, George F. Kennan's "Long Telegram" from Moscow helped articulate the US government's increasingly hard line against the Soviets and became the basis for the US "containment" strategy toward the Soviet Union. On March 5, 1946, Winston Churchill gave a speech declaring that an "Iron Curtain" had descended across Europe, pointing to efforts by the Soviet Union to block itself and its satellite states from open contact with the West.



The Iron Curtain depicted as a black line. Warsaw Pact countries on one side of the Iron Curtain appear shaded red; NATO members on the other shaded blue; militarily neutral countries shaded gray. The black dot represents Berlin.

Provided by: Wikipedia. Located at: https://en.wikipedia.org/wiki/Iron_Curtain#/media/File:Iron_Curtain_map.svg.

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Suggested Reading and Assignments

- Review the discussion questions then read the article: *The Beginning of the Cold War*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- For each heading listed in each article, create an outline showing the main points made by the author. Use the website found on your **ArtiosHCS** curriculum website on how to write an outline.
- Complete your **timeline**, complete with pictures that you find online, that record events and policies leading up to and during World War II.
- Present EITHER your presentation after finding a **WWII veteran** to interview or listening to an interview by a WWII vet OR your paper or presentation on the legal influence the **Nuremberg Trials** had upon international law regarding genocide and other crimes against humanity.
- Be sure to visit your **ArtiosHCS curriculum** website for additional resources and any videos and websites assigned for this lesson.

Vocabulary

commissariat

federation

expropriation

Key People, Places, and Events

Cold War	Long Telegram	Joseph McCarthy
Western Bloc	X Article	Iron Curtain
Eastern Bloc	Second Red Scare	Warsaw Pact
European Common Market	Alger Hiss	North Atlantic Treaty Organization (NATO)
European Union	Julius Rosenberg	Berlin Wall
Containment	Ethel Rosenberg	Holodomor

Adapted for High School from:

Boundless World History

source: courses.lumenlearning.com

Beginning of the Cold War, Part Two

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EUROPE AFTER WORLD WAR II

The aftermath of World War II was the beginning of an era defined by the decline of the old great powers and the rise of two superpowers: the Soviet Union (USSR) and the United States, creating a bipolar world. After being allied during World War II, the US and USSR became competitors on the world stage and engaged in the **Cold War**, so-called because it never boiled over into open war between the two powers but was focused on espionage, political subversion, and proxy wars. Western Europe and Japan were rebuilt through a program of American foreign aid, whereas Eastern Europe fell in the Soviet sphere of influence and rejected the plan. Europe was divided into a US-led **Western Bloc** and a Soviet-led **Eastern Bloc**.

As a consequence of the war, the Allies had created the United Nations, a new global organization for international cooperation and diplomacy. Members of the United Nations agreed to outlaw wars of aggression to avoid a third world war. The devastated great powers of Western Europe formed the European Coal and Steel Community, which later evolved into the **European Common Market** and ultimately into the current **European Union**. This effort primarily began as an attempt to avoid another war between Germany and France by economic cooperation and integration and as a common market for important natural resources.

Economic Aftermath

Occupation and Territory Reallocation
The Allies established occupation administrations in Austria and Germany. The former became a neutral state, non-aligned with any political bloc. The latter was divided into western and eastern occupation zones controlled by the Western Allies and the USSR accordingly. A denazification program

in Germany led to the prosecution of Nazi war criminals and the removal of ex-Nazis from power, although this policy moved towards amnesty and reintegration of ex-Nazis into West German society.

Germany lost a quarter of its prewar (1937) territory. Among the eastern territories, Silesia, Neumark, and most of Pomerania were taken over by Poland; East Prussia was divided between Poland and the USSR, with 9 million Germans expelled from these provinces; and 3 million Germans from the Sudetenland in Czechoslovakia to Germany. By the 1950s, every fifth West German was a refugee from the east. The Soviet Union also took over the Polish provinces east of the Curzon line, from which 2 million Poles were expelled; northeast Romania, parts of eastern Finland, and the three Baltic states were also incorporated into the USSR.

Economic Aftermath

The US emerged from the war much richer than any other nation and dominated the world economy; it had a baby boom and by 1950 its gross domestic product per person was much higher than that of any of the other powers.

The European economy, on the other hand, had collapsed and 70% of the industrial infrastructure was destroyed. The property damage in the Soviet Union consisted of complete or partial destruction of 1,710 cities and towns, 70,000 villages, and 31,850 industrial establishments. The strength of the economic recovery following the war varied throughout the world, though in general it was quite robust. In Europe, West Germany declined economically during the first years of the Allied occupation but later experienced a remarkable recovery and had by the end of the 1950s doubled production from its prewar levels. Italy came out of the war in poor economic condition, but by the

1950s, the Italian economy was marked by stability and high growth. France rebounded quickly and enjoyed rapid economic growth and modernization under the Monnet Plan. The UK, by contrast, was in a state of economic ruin after the war and continued to experience relative economic decline for decades to follow.

The Long Telegram

The first phase of the Cold War began in the first two years after the end of the Second World War in 1945. The USSR consolidated its control over the states of the Eastern Bloc, while the United States began a strategy of global “**Containment**” to challenge Soviet power, extending military and financial aid to the countries of Western Europe. An important moment in the development of America’s initial Cold War strategy was the delivery of the “**Long Telegram**” sent from Moscow by American diplomat George Kennan in 1946.

Kennan’s “Long Telegram” and the subsequent 1947 article “The Sources of Soviet Conduct” argued that the Soviet regime was inherently expansionist and that its influence had to be “contained” in areas of vital strategic importance to the United States. These texts provided justification for the Truman administration’s new anti-Soviet policy. Kennan played a major role in the development of definitive Cold War programs and institutions.

The X Article

Unlike the “Long Telegram,” Kennan’s well-timed article in the July 1947 issue of *Foreign Affairs* attributed the pseudonym “**X Article**,” entitled “The Sources of Soviet Conduct,” did not begin by emphasizing “traditional and instinctive Russian sense of insecurity”; instead, it asserted that Stalin’s policy was shaped by a combination of Marxist and Leninist ideology, which advocated revolution to defeat the capitalist forces in the outside world and Stalin’s determination to use the notion of “capitalist encirclement” to legitimize his regimentation of Soviet society so that he could consolidate his political power. Kennan argued that Stalin would not (and moreover could not) moderate the supposed Soviet determination to overthrow Western governments. Thus, “The main element of any United States policy toward the Soviet Union must be a long-term, patient but firm and vigilant containment of Russian expansive tendencies. . . . Soviet pressure against the free institutions of the Western world is something that

can be contained by the adroit and vigilant application of counterforce at a series of constantly shifting geographical and political points, corresponding to the shifts and maneuvers of Soviet policy, but which cannot be charmed or talked out of existence.”

Second Red Scare

*As happened after the first world war, a **Second Red Scare** followed on the heels of World War II. In 1948, a former State Department official named **Alger Hiss** faced an accusation of passing secret documents to a Soviet agent. Since the statute of limitations had expired, Hiss could not face trial for espionage, by he was convicted of perjury for denying the accusations under oath in Congress.*

*In 1950 a British-American spy ring was discovered, and a couple named **Julius and Ethel Rosenberg** were convicted of passing to the Soviets classified information about the atomic bomb’s development. They were executed in 1953.*

*In 1951, Senator **Joseph McCarthy** declared that he had a list of Communists who were government employees. The Senate launched an investigation, but none were found—partly because they had already been rooted out. As in a witch hunt, opponents to McCarthy’s ongoing claims remained silent due to fear of accusation. He was eventually denounced, and the term “**McCarthyism**” was coined, referring to overly suspicious behavior in government or corporate contexts.*

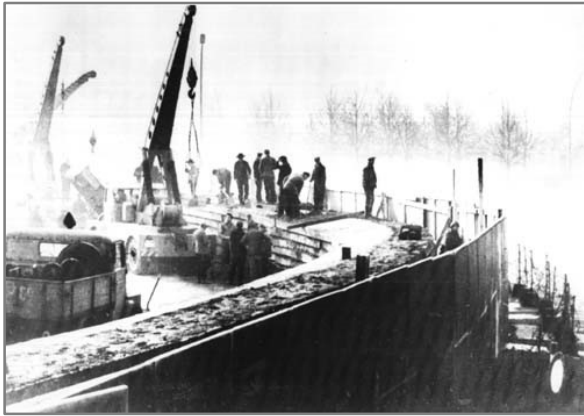
THE IRON CURTAIN

On March 5, 1946, Winston Churchill gave a speech declaring that an “**Iron Curtain**” had descended across Europe, pointing to efforts by the Soviet Union to block itself and its satellite states from open contact with the West.

The Iron Curtain formed the imaginary boundary dividing Europe into two separate areas from the end of World War II in 1945 until the end of the Cold War in 1991. The term symbolized efforts by the Soviet Union to block itself and its satellite states from open contact with the West and non-Soviet-controlled areas. On the east side of the Iron Curtain were the countries connected to or influenced by the Soviet Union. On either side of the Iron Curtain, states developed their own international economic and military alliances. On the east side were member countries of the Council for Mutual Economic Assistance and the **Warsaw Pact** (a collective

defense treaty between the Eastern Bloc republics), with the Soviet Union as the leading state, while on the west were countries which had joined the **North Atlantic Treaty Organization (NATO)**, with the United States as the preeminent power.

Physically, the Iron Curtain took the form of border defenses between the countries of Europe in the middle of the continent. The most notable border was marked by the **Berlin Wall** and its “Checkpoint Charlie,” which served as a symbol of the Curtain as a whole.



East German construction workers building the Berlin Wall, 20 November 1961

Background

The antagonism between the Soviet Union and the West that came to be described as the “Iron Curtain” had various origins.

The Allied Powers and the Central Powers had backed the White movement against the Bolsheviks during the 1918–1920 Russian Civil War, a fact not forgotten by the Soviets.

A series of events during and after World War II exacerbated tensions, including the Soviet-German pact during the first two years of the war leading to subsequent invasions, the perceived delay of an amphibious invasion of German-occupied Europe, the western Allies’ support of the Atlantic Charter, disagreement in wartime conferences over the fate of Eastern Europe, the Soviets’ creation of an Eastern Bloc of Soviet satellite states, western Allies scrapping a plan to support the rebuilding of German industry, and the Marshall Plan.

In the course of World War II, Stalin determined to acquire a buffer area against Germany, with pro-Soviet states on its border in an Eastern bloc. Stalin’s aims led to strained relations at the Yalta Conference (February 1945) and the subsequent Potsdam Conference (August 1945). People in the West expressed opposition to Soviet domination over the

buffer states, leading to growing fear that the Soviets were building an empire that might threaten them and their interests.

Nonetheless, at the Potsdam Conference, the Allies assigned parts of Poland, Finland, Romania, Germany, and the Balkans to Soviet control or influence. In return, Stalin promised the Western Allies he would allow those territories the right to national self-determination. Despite Soviet cooperation during the war, these concessions left many in the West uneasy. In particular, Churchill feared that the United States might return to its prewar isolationism, leaving the exhausted European states unable to resist Soviet demands.

Iron Curtain Speech

Winston Churchill’s “Sinews of Peace” address of March 5, 1946, at Westminster College, used the term “Iron Curtain” in the context of Soviet-dominated Eastern Europe:

“From Stettin in the Baltic to Trieste in the Adriatic an ‘Iron Curtain’ has descended across the continent. Behind that line lie all the capitals of the ancient states of Central and Eastern Europe. Warsaw, Berlin, Prague, Vienna, Budapest, Belgrade, Bucharest and Sofia; all these famous cities and the populations around them lie in what I must call the Soviet sphere, and all are subject, in one form or another, not only to Soviet influence but to a very high and in some cases increasing measure of control from Moscow.”

Churchill mentioned in his speech that regions under the Soviet Union’s control were expanding their leverage and power without any restriction. He asserted that to put a brake on this phenomenon, the commanding force of and strong unity between the UK and the US was necessary.

Much of the Western public still regarded the Soviet Union as a close ally in the context of the recent defeat of Nazi Germany and of Japan. Although not well received at the time, the phrase Iron Curtain gained popularity as a shorthand reference to the division of Europe as the Cold War strengthened. The Iron Curtain served to keep people in and information out, and people throughout the West eventually came to accept the metaphor.

THE SOVIET UNION

Stalin’s regime was a totalitarian state under his dictatorship. He exercised extensive personal control

over the Communist Party and unleashed an unprecedented level of violence to eliminate any potential threat to his regime. While Stalin exercised major control over political initiatives, their implementation was in the control of localities, often with local leaders interpreting the policies in a way that served themselves best. This abuse of power by local leaders exacerbated the violent purges and terror campaigns carried out by Stalin against members of the Party deemed to be traitors. Stalin had unleashed the Great Terror campaign against alleged “socially dangerous” and “counter-revolutionary” persons that resulted in the Great Purge of 1936–38, during which 1.5 million people were arrested from 1937–38 and 681,692 of those executed. The Stalinist era saw the introduction of a system of forced labor for convicts and political dissidents, the Gulag system created in the early 1930s.

Collectivization

Widespread famine ensued from collectivization and affected Ukraine, southern Russia, and other parts of the USSR. The death toll from famine in the Soviet Union is estimated between 5 and 10 million people. Most modern scholars agree that the famine was caused by the policies of the government of the Soviet Union under Stalin, rather than by natural causes. According to Alan Bullock, “the total Soviet grain crop was no worse than that of 1931. . . It was not a crop failure but the excessive demands of the state, ruthlessly enforced, that cost the lives of as many as five million Ukrainian peasants.”



Collectivization in the Soviet Union: “Strengthen working discipline in collective farms,” Soviet propaganda poster issued in Uzbekistan (1933).

https://en.wikipedia.org/wiki/Collectivization_in_the_Soviet_Union.

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The **Holodomor** (Ukrainian for “extermination by hunger”), also known as the Terror-Famine and

Famine-Genocide in Ukraine, was a man-made famine in Ukraine in 1932 and 1933 that killed an estimated 2.5–7.5 million Ukrainians, with millions more in demographic estimates. It was part of the wider disaster, the Soviet famine of 1932–33, which affected the major grain-producing areas of the country.

During the Holodomor millions of inhabitants of Ukraine, primarily ethnic Ukrainians, died of starvation in a peacetime catastrophe unprecedented in the history of the country. Since 2006, the Holodomor has been recognized by the independent Ukraine and 24 other countries as a genocide of the Ukrainian people carried out by the Soviet Union.



Chicago's American front page depicting Holodomor's starvation to death of six million Ukrainians

Stalin refused to release large grain reserves that could have alleviated the famine, while continuing to export grain; he was convinced that the Ukrainian peasants had hidden grain away and strictly enforced draconian new collective-farm theft laws in response.

The Soviet famine of 1932–33 affected the major grain-producing areas of the Soviet Union, leading to millions of deaths in those areas and severe food shortage throughout the USSR.

Satellite States

According to Article 76 of the Constitution of the Soviet Union, a Union Republic was a sovereign Soviet socialist state that had united with other Soviet Republics in the Union of Soviet Socialist Republics. Article 81 of the Constitution stated that

“the sovereign rights of Union Republics shall be safeguarded by the USSR.” In 1944, amendments to the All-Union Constitution allowed for separate branches of the Red Army for each Soviet Republic. They also allowed for Republic-level **commissariats** (Soviet government departments) for foreign affairs and defense, allowing them to be recognized as *de jure* independent states in international law. This allowed for two Soviet Republics, Ukraine, and Byelorussia, as well as the USSR as a whole to join the United Nations General Assembly as founding members in 1945.

Therefore, constitutionally the Soviet Union was a **federation** (a group of states with a central government but independence in internal affairs). In accordance with provisions present in the Constitution (versions adopted in 1924, 1936, and 1977), each republic retained the right to secede from the USSR. Throughout the Cold War, this right was widely considered meaningless, and the Soviet Republics were often referred to as “satellite states.” The term satellite state designates a country that is formally independent in the world, but under heavy political, economic, and military influence or control from another country. The term is used mainly to refer to Central and Eastern European countries of the Warsaw Pact during the Cold War.

For the duration of the Cold War, the countries of Eastern Europe became Soviet satellite states—they were “independent” nations, one-party Communist States whose General Secretary had to be approved by the Kremlin, and so their governments usually kept their policy in line with the wishes of the Soviet Union. However, nationalistic forces and pressures within the satellite states played a part in causing deviation from strict Soviet rule.

Conditions in the Eastern Bloc

Throughout the Eastern Bloc, both in the Soviet Socialist Republic and the rest of the Bloc, Russia was given prominence and referred to as the *naibolee vydajuščajasja nacija* (the most prominent nation) and the *rukovodjaščij narod* (the leading people). The Soviets encouraged the worship of everything Russian and the reproduction of their own Communist structural hierarchies in each of the Bloc states.

The defining characteristic of communism in the Eastern Bloc was the unique symbiosis of the state with society and the economy, resulting in politics and economics losing their distinctions and autonomy. While more than 15 million Eastern Bloc residents migrated westward from 1945 to 1949, emigration was effectively halted in the early 1950s, with the Soviet approach to controlling national movement emulated by most of the Eastern Bloc. The Soviets mandated **expropriation** of private property.

The Soviet-style “replica regimes” that arose in the Bloc not only reproduced Soviet command economies, but also adopted the brutal methods employed by Joseph Stalin and Soviet secret police to suppress real and potential opposition. Stalinist regimes in the Eastern Bloc saw even marginal groups of opposition intellectuals as a potential threat because of the bases underlying Stalinist power therein. The suppression of dissent and opposition was a central prerequisite for the security of Stalinist power within the Eastern Bloc, though the degree of opposition and dissident suppression varied by country and time throughout the Eastern Bloc. Furthermore, the Eastern Bloc experienced economic mismanagement by central planners resulting in extensive rather than intensive development and lagged far behind their western European counterparts in per capita gross domestic product. In addition, media in the Eastern Bloc served as an organ of the state, completely reliant on and subservient to the Communist Party. The state owned radio and television organizations while print media was usually owned by political organizations, mostly the ruling Communist Party.



Soviet Union stamp of 1950, depicting the flags and peoples of the Eastern Bloc

The Artios Home Companion Series

Unit 21: The Cold War Era Continues

Teacher Overview

ALTHOUGH THE Soviet Union and the United States had been allied in their struggle against Hitler's Germany, Americans distrusted Stalin's communist government and abhorred the spread of communism immediately after World War II. Following a 22-year civil war, mainland China unexpectedly became communist in 1949. After the outbreak of the Korean War, the US came to aid of South Korea against communist North Korea.

President Eisenhower further progressed Cold War policy, with initiatives including overtures to the Soviet Union, meeting with Spanish dictator Francisco Franco, and signing the armistice stifling the Korean War. In domestic affairs, Eisenhower expanded Social Security, kept the national debt low, reduced taxes, and limited immigration. Despite an ambiguous early stand on civil rights, he later introduced the first civil rights legislation since 1875.



Germans watching Berlin Airlift supply planes
USAF - States Air Force Historical Research Agency via Cees Steijger
(1991), *A History of USAFE*



During the hunger-winter of 1947, thousands protested in West Germany against the disastrous food situation. The sign says: "We want coal, we want bread."
Attribution: Bundesarchiv, Bild 183-B0527-0001-753 / CC-BY-SA 3.0

Suggested Reading and Assignments

In this unit, students will:

- Complete six lessons in which they will learn about the continuing **Cold War**, **rising tensions in the Middle East**, the **Chinese Communist Revolution**, the **Korean War**, the **Eisenhower administration**, and the **emergence of the Civil Rights Movement**, journaling and answering discussion questions as they read.
- Define vocabulary words.
- Do outside research and write an essay on **Mohandas Gandhi and the strategies he employed in his campaigns for India's independence**.
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

God's Word tells us there will be times for both war and peace.

A time to love, and a time to hate; a time for war, and a time for peace.
– Ecclesiastes 3:8

"The only thing necessary for the triumph of evil is for good men to do nothing." – Edmund Burke

When the righteous increase, the people rejoice: but when the wicked rule, the people groan.
– Proverbs 29:2

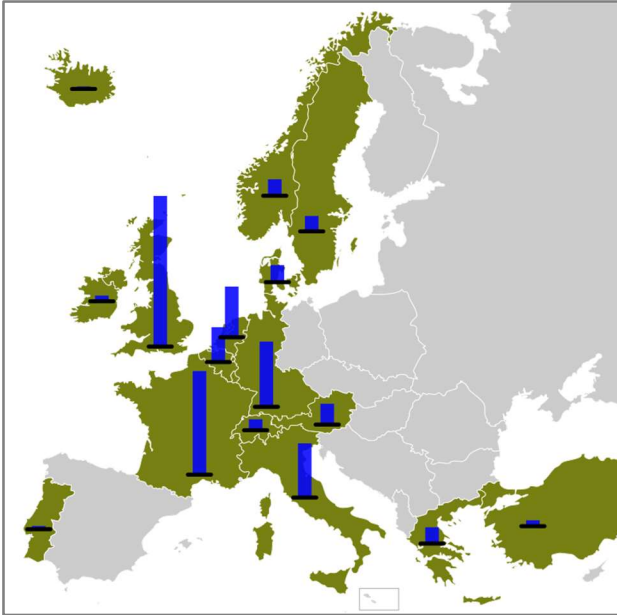
Before God, all men and women are created equal.

There is neither Jew nor Gentile, neither slave nor free, nor is there male and female, for you are all one in Christ Jesus.
– Galatians 3:28 (review)

Lesson One

History Overview and Assignments Containment

THE TRUMAN DOCTRINE was an American foreign policy created to contain Soviet geopolitical spread during the Cold War, first announced to Congress by President Harry S. Truman on March 12, 1947. Three months later, in accordance with the Truman Doctrine, the United States enacted the Marshall Plan. This was a pledge of economic assistance for all European countries willing to participate, including the Soviet Union. This state refused, however, and created their own Molotov plan for the Eastern Bloc.



Map of Cold-War era Europe and the Near East showing countries that received Marshall Plan aid. The red columns show the relative amount of total aid received per nation.

File:Blank political map of Europe EU27 iso3166-1 code.svg: Amibreton 11:46, 14 March 2009 (UTC). CC-BY-SA 3.0

Key People, Places, and Events

Truman Doctrine
NATO
Greek Civil War
Marshall Plan
National Security Act of 1947
Department of Defense
Central Intelligence Agency (CIA)
National Security Council (NSC)
Molotov Plan (COMECON)
1948 Czechoslovakia coup d'état

Vocabulary

purport

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article: *Containment, Part One*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary word in the context of the reading. Write the word and its definition in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. Describe the purpose and policy of the Truman Doctrine.
2. What conflict prompted development of this policy?
3. Why did the US develop the Marshall Plan?
4. How did the Soviet Union respond to the offer to participate in the Marshall Plan?
5. In what way was this response contradictory?
6. How did the coup in Czechoslovakia strengthen American support for the Marshall Plan?
7. In what ways did Western Europe benefit from the plan?
8. What specific results were seen in Greece and Italy?

Truman Doctrine

The **Truman Doctrine** was an American foreign policy created to counter Soviet geopolitical spread during the Cold War. It was first announced to Congress by President Harry S. Truman on March 12, 1947, and further developed on July 12, 1948, when he called upon Congress to allocate \$400 million to contain Soviet threats to Greece and Turkey. American military force was usually not involved in Truman Doctrine interventions, but Congress appropriated free gifts of financial aid to support the economies and the military of Greece and Turkey. More generally, the Truman Doctrine implied American support for other nations threatened by Soviet communism. The Truman Doctrine became the foundation of American foreign policy and led in 1949 to the formation of **NATO**. Historians often use Truman's speech to date the start of the Cold War.

Background

In 1947, Truman told Congress that "it must be the policy of the United States to support free people who are resisting attempted subjugation by armed minorities or by outside pressures." Truman reasoned that because the totalitarian regimes coerced free peoples, they represented a threat to international peace and the national security of the United States. Truman made the plea amid the crisis of the **Greek Civil War**. This was a war fought in Greece from 1946 to 1949 between the Greek government army (backed by the United Kingdom and the United States) and the Democratic Army of Greece (DSE, the military branch of the Greek Communist Party), backed by Yugoslavia and Albania as well as by Bulgaria.

Truman argued that if Greece and Turkey did not receive the aid that they urgently needed, they would inevitably fall to communism with grave consequences throughout the region and the Middle East. Because Turkey and Greece were historic rivals, it was necessary to help both equally even though the threat to Greece was more immediate.

For years, Britain had supported Greece, but was now near bankruptcy and was forced to radically reduce its involvement. In February 1947, Britain

formally requested for the United States to take over its role in supporting the Greeks and their government. The policy won the support of Republicans who controlled Congress and involved sending \$400 million in American money but no military forces to the region. The effect was to end the communist threat, and in 1952, both Greece and Turkey joined NATO, a military alliance, to guarantee their protection.

The Truman Doctrine was informally extended to become the basis of American Cold War policy throughout Europe and around the world. It shifted American foreign policy toward the Soviet Union from *détente* (a relaxation of tension) to the policy of containment of Soviet expansion advocated by diplomat George Kennan.



The labeling used on aid packages created and sent under the Marshall Plan

Marshall Plan

Britain, France, and the United States had unsuccessfully attempted to reach an agreement with the Soviet Union for an economically self-sufficient Germany, including a detailed accounting of the industrial plants, goods, and infrastructure already removed by the Soviets. In June 1947, in accordance with the Truman Doctrine, the United

States enacted the **Marshall Plan**, a pledge of economic assistance for all European countries willing to participate, including the Soviet Union. This plan was designed to rebuild the democratic and economic systems of Europe and counter perceived threats to Europe's balance of power, such as communist parties seizing control through revolutions or elections. The plan also asserted that European prosperity was contingent upon German economic recovery.

The United States gave over \$12 billion in economic support to help rebuild Western European economies after the end of World War II. The plan was in operation for four years beginning April 8, 1948. The goals of the United States were to rebuild war-devastated regions, remove trade barriers, modernize industry, make Europe prosperous again, and prevent the spread of communism. The Marshall Plan required a lessening of interstate barriers, saw a decrease in regulations, and encouraged an increase in productivity, labor union membership, and the adoption of modern business procedures.



Construction in West Berlin with the help of the Marshall Plan after 1948. The plaque reads: "Emergency Program Berlin—with the help of the Marshall Plan."

One month after the plan's enactment, Truman signed the **National Security Act of 1947**, creating a unified **Department of Defense**, the **Central Intelligence Agency (CIA)**, and the **National Security Council (NSC)**. These would become the main bureaucracies for US policy in the Cold War.

Stalin believed that economic integration with the West would allow Eastern Bloc countries to escape Soviet control, and that the US was trying to buy a pro-US realignment of Europe. Stalin therefore prevented Eastern Bloc nations from receiving Marshall Plan aid. The Soviet Union's alternative to the Marshall plan, **purported** to involve Soviet subsidies and trade with central and eastern Europe, became known as the **Molotov Plan**.

Stalin was also fearful of a reconstituted Germany; his vision of a post-war Germany did not include the ability to rearm or pose any kind of threat to the Soviet Union. The plan was a system of bilateral trade agreements that established **COMECON** to create an economic alliance of socialist countries. This aid allowed countries in Europe to stop relying on American aid, and therefore allowed Molotov Plan states to reorganize their trade to the USSR instead. The plan was in some ways contradictory, however, because at the same time the Soviets were giving aid to Eastern bloc countries, they were demanding that countries who were members of the Axis powers pay reparations to the USSR.

In early 1948, following reports of strengthening "reactionary elements," Soviet operatives executed a coup in Czechoslovakia, the only Eastern Bloc state that the Soviets had permitted to retain democratic structures. The public brutality of this **1948 Czechoslovakia coup d'état** shocked Western powers and set in a motion a brief scare that swept away the last vestiges of opposition to the Marshall Plan in the United States Congress.

The twin policies of the Truman Doctrine and the Marshall Plan led to billions in economic and military aid for Western Europe, Greece, and Turkey. The years 1948 to 1952 saw the fastest period of growth in European history. Industrial production increased by 35%. Agricultural production substantially surpassed pre-war levels. The poverty and starvation of the immediate postwar years disappeared, and Western Europe embarked upon an unprecedented two decades of growth during which standards of living increased dramatically.

With US assistance, the Greek military won its civil war. Then in Italy, the Italian Christian Democrats defeated the powerful Communist-Socialist alliance in the elections of 1948.

At the same time, however, there was increased intelligence and espionage activity, Eastern Bloc defections, and diplomatic expulsions.

Lesson Two

History Overview and Assignments The Berlin Blockade and Airlift

AS PART OF THE ECONOMIC rebuilding of Germany, in early 1948 representatives of a number of Western European governments and the United States announced an agreement for a merger of western German areas into a federal governmental system. In addition, in accordance with the Marshall Plan, they began to reindustrialize and rebuild the German economy. Shortly thereafter, Stalin instituted the Berlin Blockade, one of the first major crises of the Cold War, preventing food, materials, and supplies from arriving in West Berlin. The United States, Britain, France, Canada, Australia, New Zealand, and several other countries began the massive Berlin airlift, supplying West Berlin with food and other provisions. The Airlift succeeded; daily operations flew more than 1,500 flights a day and delivered more than 4,500 tons of cargo, enough to keep West Berlin supplied through the blockade.



Many gather to watch a C-54 loaded with supplies land at Tempelhof Airfield in the US sector of Berlin. Over the 11-month course of the Berlin Airlift, nearly 4,000 tons of goods were delivered every day.

Henry Ries / USAF - United States Air Force Historical Research Agency via Cees Steijger (1991), *A History of USAFE*

Suggested Reading and Assignments

- Review the discussion questions then read the article: *Containment, Part Two*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Be sure to visit your [ArtiosHCS](#) curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

Berlin Blockade

Berlin Airlift

TASS

Discussion Questions

1. Describe the crisis that led to the Berlin Airlift.
2. What decision would an airlift force the Soviets to make?
3. Was this strategy successful?
4. How did the Airlift allow the West Berliners respond to the Soviets?

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Beginning of the Cold War, Part Two

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Berlin

In 1945, the victorious Allied Powers had reached the Potsdam Agreement on the fate of postwar Europe, calling for the division of defeated Germany into four temporary occupation zones. These zones were located roughly around the then-current locations of the Allied armies. Also divided into occupation zones, the city of Berlin was located 100 miles inside Soviet-controlled eastern Germany. The United States, United Kingdom, and France controlled western portions of the city, while Soviet troops controlled the eastern sector.

In a June 1945 meeting, Stalin informed German communist leaders that he expected to slowly undermine the British position within their occupation zone, that the United States would withdraw within a year or two, and that nothing would then stand in the way of a united Germany under communist control within the Soviet orbit. Stalin and other leaders told visiting Bulgarian and Yugoslavian delegations in early 1946 that Germany must be both Soviet and communist.

Creation of an economically stable western Germany required reform of the unstable *Reichsmark* German currency introduced after the 1920s German inflation. The Soviets had debased the Reichsmark by excessive printing, resulting in Germans using cigarettes for bartering. The Soviets opposed western plans for a reform. They interpreted this new currency as an unjustified, unilateral decision.

On June 18, the United States, Britain, and France announced that on June 21 the *Deutsche Mark* currency would be introduced, but the Soviets refused to permit its use as legal tender in Berlin. The Allies had already transported 2.5 million Deutsche Marks into the city, and it quickly became the standard currency in all four sectors. Against the wishes of the Soviets, the new currency, along with the Marshall Plan that backed it, appeared to have the potential to revitalize Germany. Stalin looked to force the Western nations to abandon Berlin.

The Blockade

The day after the announcement of the new Deutsche Mark, Soviet guards halted all passenger

trains and traffic on the Autobahn to Berlin, delayed Western and German freight shipments, and required that all water transport secure special Soviet permission. On June 21, 1948, the day the Deutsche Mark was introduced, the Soviet military halted a United States military supply train to Berlin and sent it back to western Germany. On June 22, the Soviets announced that they would introduce a new currency in their zone.

On June 24, the Soviets severed land and water connections between the non-Soviet zones and Berlin. That same day, they halted all rail and barge traffic in and out of Berlin. On June 25, the Soviets stopped supplying food to the civilian population in the non-Soviet sectors of Berlin. Motor traffic from Berlin to the western zones was permitted, but this required a 14.3-mile detour to a ferry crossing because of alleged “repairs” to a bridge. They also cut off Berlin’s electricity using their control over the generating plants in the Soviet zone.

At the time, West Berlin had 36 days’ worth of food, and 45 days’ worth of coal. Militarily, the Americans and British were greatly outnumbered because of the postwar reduction in their armies. The United States, like other western countries, had disbanded most of its troops and was largely inferior in the European theater. The entire United States Army was reduced to 552,000 men by February 1948. Military forces in the western sectors of Berlin numbered only 8,973 Americans, 7,606 British, and 6,100 French. Soviet military forces in the Soviet sector that surrounded Berlin totaled 1.5 million. The two United States regiments in Berlin could have provided little resistance against a Soviet attack. Believing that Britain, France, and the United States had little option other than to acquiesce, the Soviet Military Administration in Germany celebrated the beginning of the **Berlin Blockade**.

Berlin Airlift

Although the ground routes were never negotiated, the same was not true of the air. On November 30, 1945, it was agreed in writing that there would be three 20-mile-wide air corridors providing free access to Berlin. Additionally, unlike a force of tanks and trucks, the Soviets could not claim

that cargo aircraft were some sort of military threat. In the face of unarmed aircraft refusing to turn around, the only way to enforce the blockade would have been to shoot them down. An airlift would force the Soviet Union to either shoot down unarmed humanitarian aircraft, thus breaking their own agreements, or back down.

Enforcing this would require an airlift that really worked. If the supplies could not be flown in fast enough, Soviet help would eventually be needed to prevent starvation. The American military government, based on a minimum daily ration of 1,990 calories, set a total of daily supplies at 646 tons of flour and wheat, 125 tons of cereal, 64 tons of fat, 109 tons of meat and fish, 180 tons of dehydrated potatoes, 180 tons of sugar, 11 tons of coffee, 19 tons of powdered milk, 5 tons of whole milk for children, 3 tons of fresh yeast for baking, 144 tons of dehydrated vegetables, 38 tons of salt, and 10 tons of cheese. In all, 1,534 tons were required each day to sustain the more than two million people of Berlin. Additionally, for heat and power, 3,475 tons of coal and gasoline were also required daily.

During the first week, the airlift averaged only ninety tons a day, but by the second week it reached 1,000 tons. This likely would have sufficed had the effort lasted only a few weeks as originally believed. The Communist press in East Berlin ridiculed the project. It derisively referred to “the futile attempts of the Americans to save face and to maintain their untenable position in Berlin.”

But by the end of August, after two months, it was clear the **Berlin Airlift** was succeeding; daily operations flew more than 1,500 flights a day and delivered more than 4,500 tons of cargo, enough to keep West Berlin supplied.

As the tempo of the Airlift grew, it became

apparent that the Western powers might be able to pull off the impossible: indefinitely supplying an entire city by air alone. In response, starting on August 1, the Soviets offered free food to anyone who crossed into East Berlin and registered their ration cards there, but West Berliners overwhelmingly rejected Soviet offers of food.

The Soviets had an advantage in conventional military forces but were preoccupied with rebuilding their war-torn economy and society. The US had a stronger navy and air force as well as nuclear weapons. Neither side wanted a war; the Soviets did not disrupt the airlift.

End of the Blockade

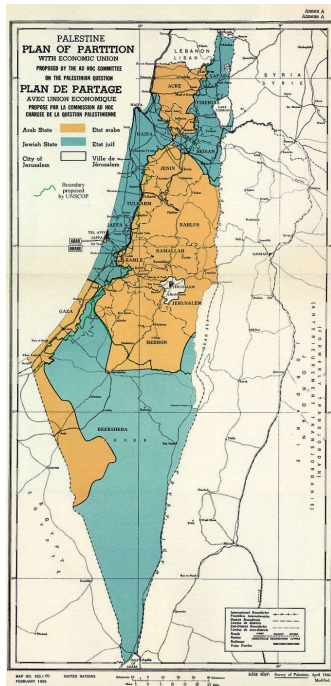
On April 15, 1949, the Russian news agency **TASS** reported a willingness by the Soviets to lift the blockade. The next day the US State Department stated, “The way appears clear” for the blockade to end. Soon afterward, the four powers began serious negotiations, and a settlement was reached on Western terms. On May 4, 1949, the Allies announced that an agreement had been reached to end the blockade in eight days’ time.

The Soviet blockade of Berlin was lifted at one minute after midnight on May 12, 1949. A British convoy immediately drove through to Berlin, and the first train from West Germany reached Berlin at 5:32 a.m. Later that day an enormous crowd celebrated the end of the blockade. The airlift’s primary orchestrator, General Lucius D. Clay, whose retirement had been announced by US President Truman on May 3, was saluted by 11,000 US soldiers and dozens of aircraft. Once home, Clay received a ticker-tape parade in New York City, was invited to address the US Congress, and was honored with a medal from President Truman.

Lesson Three

History Overview and Assignments Israel and Palestine

AFTER THOUSANDS of years of Jews living as minorities in countries across the globe, a movement called Zionism emerged in the late 19th century, with the goal of establishing a Jewish homeland and sovereign state. The movement was energized by rising antisemitism in Europe and anti-Jewish pogroms in Russia and was aimed at encouraging Jewish migration to Ottoman Palestine. The movement was eventually successful in establishing Israel as an independent state on May 14, 1948, as the homeland for the Jewish people. The following day, the armies of four Arab countries—Egypt, Syria, Transjordan, and Iraq—entered what had been British Mandatory Palestine, launching the 1948 Arab–Israeli War, which continued for one year until a ceasefire.



United Nations Partition Plan for Palestine 1947: A map of the UN plan for partitioning Palestine into independent Arab and Jewish states and a Special International Regime for the city of Jerusalem

Key People, Places, and Events

Zionist Movement
 Theodor Herzl
 Peel Commission
 White Paper of 1939
 David Ben-Gurion
 Partition Plan For Palestine
 Israeli Declaration of Independence
 1948 Arab-Israeli War
 Arab League
 West Bank
 Gaza Strip
 Palestinian Exodus of 1948

Vocabulary

diaspora

Suggested Reading and Assignments

- Review the discussion questions and vocabulary then read the article: *Israel and Palestine*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary word in the context of the reading. Write the word and its definition in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. In response to what was the Zionist Movement founded?
2. For what purpose was the Peel Commission established?
3. In what two ways did Britain respond to the commission's proposed solution?
4. List the steps that led to the adoption of the United Nations Partition Plan.
5. List the three main components of the plan.
6. How did the Palestinians respond to the plan?
7. What did David Ben-Gurion declare on May 14, 1948?
8. Describe the results of the conflict that followed.

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Israel and Palestine

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Zionism

After almost two millennia of the Jewish **diaspora** residing in various countries without a national state, the **Zionist Movement** was founded

in the late 19th century by secular Jews, largely as a response by Ashkenazi Jews to rising antisemitism in Europe, exemplified by the anti-Jewish pogroms in the Russian Empire. The political movement was

formally established by the Austro-Hungarian journalist **Theodor Herzl** in 1897 following the publication of his book *Der Judenstaat* (The Jewish State). At that time, the movement sought to encourage Jewish migration to Ottoman Palestine.

British Mandate

In 1923, the land of Palestine, previously under the control of the Ottoman Empire, was made a British mandate (a territory in which administrative control was legally transferred by the League of Nations to Great Britain). During WW I, the British made conflicting promises to the Arab and Jewish populations of Palestine.

In 1933, Hitler came to power in Germany, and in 1935 the Nuremberg Laws made German Jews (and later Austrian and Czech Jews) stateless refugees. Similar rules were applied by the many Nazi allies in Europe. The subsequent growth in Jewish migration and the impact of Nazi propaganda aimed at the Arab world led to an Arab revolt in Palestine. In 1937, Britain established the **Peel Commission** to investigate the situation. The commission did not consider the situation of Jews in Europe but called for a two-state solution and compulsory transfer of populations. Britain rejected this solution and instead implemented the **White Paper of 1939**, which called for the establishment of a Jewish national home in an independent Palestinian state within ten years. It also limited Jewish immigration to 75,000 for five years. This was disastrous to European Jews, who were already gravely discriminated against and in need of refuge. The British maintained this policy until the end of the Mandate.

During World War II, as the horrors of the Holocaust became known, the Zionist leadership formulated the One Million Plan, a reduction from Jewish Agency president **David Ben-Gurion's** previous target of two million immigrants to Palestine. Following the end of the war, a massive wave of stateless Jews, mainly Holocaust survivors, began migrating to Palestine in small boats in defiance of British rules. The Holocaust united much of the rest of worldwide Jewish community behind the Zionist project. The British either imprisoned these Jews in Cyprus or sent them to the British-controlled Allied Occupation Zones in Germany. The British, having faced the Arab revolt against mass Jewish immigration into Palestine, were now facing opposition by Zionist groups in Palestine for subsequent restrictions.

The Haganah, a Jewish paramilitary organization, prepared for armed struggle against British rule.

United Nations Partition Plan for Palestine

After World War II, in August 1945 President Truman asked for the admission of 100,000 Holocaust survivors into Palestine, but the British maintained their limits on Jewish immigration. This led to a new inquiry into partitioning Palestine.

By 1947, the British announced their desire to terminate the Palestine Mandate and placed the “Question of Palestine” before the United Nations, which developed a non-binding recommendation for independent Arab and Jewish states.

On November 29, 1947, the United Nations General Assembly adopted a **Partition Plan For Palestine**. This specified borders for new Arab and Jewish states and an area of Jerusalem to be administered by the UN under an international regime. The end of the British Mandate for Palestine was set for midnight on May 14, 1948.

The Palestinians rejected the plan. On December 1, 1947, the Arab Higher Committee proclaimed a three-day strike, and Arab gangs began attacking Jewish targets. The Jews were initially on the defensive as civil war broke out, but in early April 1948 moved onto the offensive. The Arab Palestinian economy collapsed, and 250,000 Palestinian Arabs fled or were expelled.

Israeli Declaration of Independence

On May 14, 1948, the day before the expiration of the British Mandate, David Ben-Gurion issued an **Israeli Declaration of Independence**, declaring “the establishment of a Jewish state in *Eretz-Israel*, to be known as the State of Israel.”

1948 Arab-Israeli War

The following day, the armies of four Arab countries—Egypt, Syria, Transjordan, and Iraq—entered what had been British Mandatory Palestine, launching the **1948 Arab-Israeli War**. Contingents from Yemen, Morocco, Saudi Arabia, and Sudan also joined the war. The purpose of the invasion was to prevent the establishment of the Jewish state at inception, and some Arab leaders reportedly talked about driving the Jews into the sea. The **Arab League** stated that the invasion was to restore law and order and prevent further bloodshed.

After a year of fighting, a ceasefire was declared

and temporary borders, known as the Green Line, were established. As a result of the war, the State of Israel gained control of the area the UN had proposed for the Jewish state, as well as almost 60% of the territory proposed for the Arab state. Jordan annexed what became known as the **West Bank**, including East Jerusalem, and Egypt took control of the **Gaza Strip**.

The United Nations estimated that around 750,000 Palestinian Arabs (85% of the population) were expelled by or fled from advancing Israeli forces during the conflict. This would become known as the **Palestinian Exodus of 1948**, and in Arabic as the *Nakba* (“catastrophe”). Around 260,000 Jews moved to Israel from the Arab world during and immediately after the war.

Lesson Four

History Overview and Assignments Communist China

THROUGHOUT ITS SHORT EXISTENCE, the Republic of China (1912-1949) experienced a nearly continuous power struggle. The eventual war between the nationalists and the communists ended with the Nationalist government retreating to Taiwan, while the communists took control of mainland China and established the People’s Republic of China.



National Emblem of the People’s Republic of China

Key People, Places, and Events

Nationalist Party
Republic of China
Chiang Kai-shek
Chinese Communist Party
Mao Zedong
Red Army
Long March
Chinese Civil War
Taiwan
People’s Republic of China
Korean War
Sino-Soviet Treaty of Friendship and Alliance
Great Leap Forward
Great Chinese Famine
Cultural Revolution
Red Guard
Shadian Incident
Nikita Khrushchev
KGB
First Five-Year Plan
Sino-Soviet split

Suggested Reading and Assignments

- Review the discussion questions then read the article: *Communist China*.
- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. Outline the successes and failures of the Republic of China during its decades in power.
2. Trace the rise of the Chinese Communist Party to power.
3. Discuss the key beliefs of the Communist Party of China and Chairman Mao.
4. Describe the Cultural Revolution and its negative and positive effects on Chinese society.
5. Discuss why the Soviet Union and the People's Republic broke their relations and the consequences of the split.

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Communist China

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Background:

Republic of China

In 1911, a revolt against the Manchu-led Qing dynasty by the Chinese **Nationalist Party** led to the end of Chinese imperialism and the proclamation of the **Republic of China (ROC)**. The party's leadership never gained sufficient support to maintain stability, though, and warlords fought for control. In 1926, **Chiang Kai-shek** defeated the other warlords and fought to reunite the country, but the following year civil war erupted, led by **Chinese Communist Party (CCP)** leader **Mao Zedong**, after Chiang massacred Communists within the Nationalist Party.



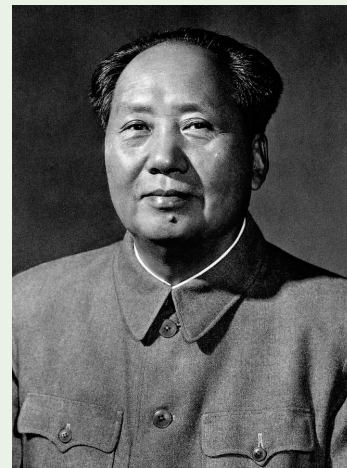
Chiang Kai-shek

Chinese Civil War

Mao sought to bring about a communist revolution by stirring the peasants to revolt. Chiang struggled to drive the **Red Army** of the CCP from their strongholds in the south, but they retreated to the north and west in a series of circular marches that became known as the **Long March**. Only about ten percent of the hundred thousand who began the long, arduous 6,000-mile march completed it, but it marked Mao's ascent to power.

*For generations Chinese have been taught a glorious account of the Long March as propaganda to justify Mao's Communist Revolution. According to UK journalist Martin Adams, "If you find it hard," they have been told, "think of the Long March; if you feel tired, think of our revolutionary forebears. The message has been drilled into us so that we can accomplish any goal set before us by the party because nothing compares in difficulty with what they did. Decades after the historical one, we have been spurred on to ever more Long Marches—to industrialize China, to feed the largest population in the world, to catch up with the West, to reform the socialist economy, to send men into space, to engage with the 21st century."**

During the 1930s, Chiang was forced to concentrate military strength on defending China against Japan rather than driving out the Communists. After Japan invaded Manchuria in 1931, the Nationalists and Communists joined forces, but the Japanese succeeded in occupying much of China for fourteen years.



Mao Zedong (1963)

Following the Allied defeat of Japan in 1945, the **Chinese Civil War** resumed. By 1949 the CCP

unexpectedly gained supremacy, and the Nationalist government retreated to **Taiwan**. The UN and most Western nations continued to regard the ROC in Taiwan as the sole legitimate government of China until 1971.

The communist government established in mainland China by Chairman Mao Zedong in 1949, called the **People's Republic of China (PRC)**, quickly became a brutal, tyrannical, atheistic dictatorship marked by repression, in which opponents and suspected dissidents were executed or sent to prison camps. Mao sought to revolutionize China's economy by improving industry and agriculture enough to compete with Western countries, but his poorly planned reforms brought ruin to China's steel industry and famine to the land.

*Adams, Martin, "Long March to Mythology,"
Asia Times, October 24, 2006

Aftermath of the Chinese Civil War

During the Chinese Civil War, both the Nationalists and the Communists had carried out mass atrocities, with millions of non-combatants deliberately killed by both sides. It has been estimated that atrocities resulted in the deaths of between 1.8 million and 3.5 million people between 1927 and 1949. Atrocities include deaths from forced conscription and massacres.

Most observers expected the Nationalist government to eventually fall in response to a Communist invasion of Taiwan, and the US initially showed no interest in supporting Chiang's government in its final stand. Things changed radically, however, with the onset of the **Korean War** in 1950. At this point, allowing a total communist victory over Chiang became politically impossible for the US, and President Harry Truman ordered the United States Seventh Fleet into the Taiwan Strait to prevent the ROC and PRC from attacking each other.

To this day, no armistice or peace treaty has ever been signed, and there is debate about whether the Chinese Civil War has legally ended. Cross-strait relations have been hindered by military threats and political and economic pressure, particularly over Taiwan's political status, with both governments officially adhering to a "One-China policy." The PRC still actively claims Taiwan as part of its territory and continues to threaten the ROC with a military invasion if the ROC officially declares independence by changing its name to and gaining international recognition as the Republic of Taiwan. The ROC

mutually claims mainland China and they both continue the fight over diplomatic recognition. Today, the war as such occurs on the political and economic fronts in the form of cross-strait relations without actual military action. However, the two separate states have close economic ties.

Chairman Mao and the People's Republic

Maoism, the guiding political and military ideology of the Communist Party of China, claimed that peasants should be the essential revolutionary class in China. Mao Zedong, known as Chairman Mao, was a Chinese communist revolutionary who ruled the People's Republic as an autocrat chairman of the CCP from its establishment in 1949 until his death in 1976. His Marxist-Leninist theories, military strategies, and political policies are collectively known as Maoism or Marxism-Leninism-Maoism.

Mao's revolution that founded the PRC was nominally based on Marxism-Leninism with a rural focus. During the 1960s and 1970s, the CCP experienced a significant ideological breakdown with the Communist Party of the Soviet Union and their allies. The essential difference between Maoism and other forms of Marxism is that Mao claimed that peasants should be the essential revolutionary class in China because contrary to industrial workers they were more suited to establish a successful revolution and socialist society in China.

Maoism was widely applied as the guiding political and military ideology of the CCP. It evolved together with Chairman Mao's changing views, but it emphasizes the belief that the proletarian revolution and the dictatorship of the proletariat do not wipe out bourgeois ideology. The class struggle continues, and even intensifies, during socialism. Therefore, a constant struggle against these ideologies and their social roots must be conducted.



Flag of the People's Republic of China

Mao and Joseph Stalin

During both the Second Sino-Japanese War

against the Japanese Empire and the Chinese Civil War against the Nationalist Party, Mao Zedong ignored much of the politico-military advice and direction from the Soviets. After World War II, Stalin advised Mao against seizing power because the Soviet Union had signed a Treaty of Friendship and Alliance with the Nationalists in 1945. This time, Mao obeyed Stalin's advice, calling him "the only leader of our party." However, Stalin broke the treaty, requiring Soviet withdrawal from Manchuria three months after Japan's surrender, and gave Manchuria to Mao. After the CCP's victory over the Nationalist Party, a Moscow visit by Mao culminated in the **Sino-Soviet Treaty of Friendship and Alliance** (1950), which included a \$300 million low-interest loan and a 30-year military alliance clause.

However, Mao and his supporters argued that traditional Marxism was rooted in industrialized European society and could not be applied to Asian peasant societies. Although Mao continued to develop his own thought based on that presumption, in the 1950s, Soviet-guided China followed the Soviet model of centralized economic development, emphasizing heavy industry and not treating consumer goods as a priority. Simultaneously, by the late 1950s, Mao had developed ideas that became the basis for the **Great Leap Forward** (1958–61), an economic and social campaign to transform the country's largely agrarian structure into a socialist society through rapid industrialization and collectivization. Restrictions on rural populations were enforced through forced labor, public struggle sessions, and social pressure. Private farming was prohibited, and those engaged in it were persecuted and labeled counter-revolutionaries. Many communities were assigned the production of a single commodity—steel.

The Great Leap was a social and economic disaster. Farmers attempted to produce steel on a massive scale, partially relying on backyard furnaces to achieve the production targets set by local cadres. The steel produced was of low quality and largely useless. The Great Leap reduced harvest sizes and led to a decline in the production of most goods, except substandard pig iron and steel. Further, local authorities frequently exaggerated production numbers, hiding and intensifying the problem for several years. Simultaneously, chaos in the collectives, bad weather, and exports of food necessary to secure hard currency resulted in the **Great Chinese Famine**, resulting in tens of

millions of deaths, with estimates ranging from 18 to 55 million. The Great Leap was a social and economic disaster that removed Mao from the position of power in the Communist Party of China. In 1959, Mao resigned as the President of the People's Republic, but he maintained his ceremonial and symbolic role.



People in the countryside working at night to produce steel during the Great Leap Forward

The Cultural Revolution

The **Cultural Revolution** was a sociopolitical movement, set into motion by Mao, that started in 1966 and ended in 1976 and whose stated goal was to preserve 'true' Communist ideology in China by purging remnants of capitalist and traditional elements from Chinese society and reimposing Maoism as the dominant ideology within the Party. The Revolution marked the return of Mao to a position of power after the Great Leap Forward.

The Revolution was launched after Mao alleged that bourgeois elements had infiltrated the government and society at large, aiming to restore capitalism. He insisted that these "revisionists" be removed through violent class struggle. China's youth responded to Mao's appeal by forming **Red Guard** groups around the country. The movement spread into the military, urban workers, and the Communist Party leadership itself. It resulted in widespread factional struggles in all walks of life. In the top leadership, it led to a mass purge of senior officials. During the same period, Mao's personality cult grew to immense proportions. Millions of people were persecuted in the violent struggles that ensued across the country and suffered a wide range of abuses, including public humiliation, arbitrary imprisonment, torture, sustained harassment, and seizure of property. A large segment of the population was forcibly displaced, most notably the transfer of urban youth to rural regions during the Down to the Countryside Movement.

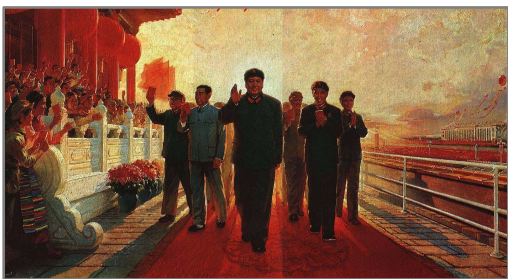
Mao set the scene for the Cultural Revolution by “cleansing” Beijing of powerful officials of questionable loyalty. His approach was less than transparent. He achieved this purge through newspaper articles, internal meetings, and skillfully employing his network of political allies.

The start of the Cultural Revolution brought huge numbers of Red Guards to Beijing, with all expenses paid by the government. The revolution aimed to destroy the “Four Olds” (old customs, old culture, old habits, and old ideas) and establish the corresponding “Four News,” which ranged from the changing of names and haircuts to ransacking homes, vandalizing cultural treasures, and desecrating temples. Within a few years, countless ancient buildings, artifacts, antiques, books, and paintings were destroyed by the members of the Red Guards.

Believing that certain liberal bourgeois elements of society continued to threaten the socialist framework, the Red Guards struggled against authorities at all levels of society and even set up their own tribunals. Chaos reigned in much of the nation.

During the Cultural Revolution, nearly all of the schools and universities in China were closed and the young intellectuals living in cities were ordered to the countryside to be “re-educated” by the peasants, where they performed hard manual labor and other work.

Mao officially declared the Cultural Revolution to have ended in 1969, but its active phase lasted until the death of the military leader Lin Biao in 1971. After Mao’s death and the arrest of the Gang of Four in 1976, reformers led by Deng Xiaoping gradually began to dismantle the Maoist policies associated with the Cultural Revolution.



Propaganda oil painting of Mao during the Cultural Revolution (1967)

Consequences

The Cultural Revolution led to the destruction of much of China’s traditional cultural heritage and the imprisonment of a huge number of citizens as well as

general economic and social chaos. Millions of lives were ruined during this period as the Cultural Revolution pierced every part of Chinese life. It is estimated that hundreds of thousands, perhaps millions, perished in the violence of the Cultural Revolution.

During the Cultural Revolution, libraries full of historical and foreign texts were destroyed and books were burned. Temples, churches, mosques, monasteries, and cemeteries were closed down and sometimes converted to other uses, looted, and destroyed. Among the countless acts of destruction, Red Guards from Beijing Normal University desecrated and badly damaged the burial place of Confucius.

Although the effects of the Cultural Revolution were disastrous for millions of people in China, there were some positive outcomes, particularly in the rural areas. For example, the upheavals of the Cultural Revolution and the hostility towards the intellectual elite are widely accepted to have damaged the quality of education in China, especially the higher education system. However, some policies also provided many in the rural communities with middle school education for the first time, which facilitated rural economic development in the 1970s and 80s. Similarly, a large number of health personnel was deployed to the countryside. Some farmers were given informal medical training and healthcare centers were established in rural communities. This led to a marked improvement in the health and the life expectancy of the general population.

The Cultural Revolution also brought to the forefront numerous internal power struggles within the Party, many of which had little to do with the larger battles between Party leaders but resulted instead from local factionalism and petty rivalries that were usually unrelated to the Revolution itself. Because of the chaotic political environment, local governments lacked organization and stability, if they existed at all. Members of different factions often fought on the streets and political assassinations, particularly in predominantly rural provinces, were common. The masses spontaneously involved themselves in factions and took part in open warfare against other factions. The ideology that drove these factions was vague and sometimes non-existent, with the struggle for local authority being the only motivation for mass involvement.

The Cultural Revolution wreaked havoc on minority cultures in China. In Inner Mongolia, some

790,000 people were persecuted. In Xinjiang, copies of the Quran and other books of the Uyghur people were burned. Muslim imams were reportedly paraded around with paint splashed on their bodies. In the ethnic Korean areas of northeast China, language schools were destroyed. In Yunnan Province, the palace of the Dai people's king was torched and a massacre of Muslim Hui people at the hands of the People's Liberation Army in Yunnan, known as the **Shadian Incident**, reportedly claimed over 1,600 lives in 1975.



Mao Tse-tung and Nikita Khrushchev, during the Russian leader's 1957 visit to Peking

Communism After Stalin's Death

After Stalin's death in 1953, the new Soviet leader **Nikita Khrushchev** made an effort to further the burgeoning relations with China begun by Stalin, traveling to the country in 1954 and making deals with the Chinese leadership that expanded the economic and political alliances between the two countries. Khrushchev also acknowledged Stalin's unfair trade deals and revealed a list of active **KGB** (internal security and secret police) agents placed in China during Stalin's reign. Khrushchev was able to arrange many prominent economic agreements during his visit.

In 1955, relations only continued to improve. Economic trade collaboration began to develop to the point that 60% of Chinese exports were to the USSR. Mao also began to implement China's first **Five Year Plan**, an intensive program of centralized economic planning modeled on the USSR. The two countries also collaborated when setting their respective foreign policies. This period has been called the "golden age" of Sino-Soviet relations.

Although before 1956 Mao and Khrushchev managed to sign numerous agreements between China and the Soviet Union, the two leaders did not develop a positive personal relationship. Mao found

Khrushchev's personality grating, and Khrushchev was unimpressed by Chinese culture.

The Sino-Soviet Split

Relations between the USSR and the PRC began to deteriorate in 1956 after Khrushchev revealed the contents of his "Secret Speech" at the 20th Communist Party Congress. The "Secret Speech" criticized many of Stalin's policies, especially his purges of Party members, and marked the beginning of Khrushchev's de-Stalinization process. This created a serious domestic problem for Mao, who had supported many of Stalin's policies and modeled many of his own after them. With Khrushchev's denouncement of Stalin, many people questioned Mao's decisions. Moreover, the emergence of movements fighting for the reforms of the existing communist systems across East-Central Europe after Khrushchev's speech worried Mao. Brief political liberalization introduced to prevent similar movements in China backfired against Mao, whose position within the Party only weakened. This convinced him further that de-Stalinization was a mistake. Mao took a sharp turn to the left ideologically, which contrasted with the ideological softening of de-Stalinization. With Khrushchev's strengthening position as Soviet leader, the two countries were set on two different ideological paths.

Mao's implementation of the Great Leap Forward, which utilized communist policies closer to Stalin than to Khrushchev, including forming a personality cult around Mao as well as more Stalinist economic policies. This angered the USSR, especially after Mao criticized Khrushchev's economic policies through the plan while also calling for more Soviet aid. The Soviet leader saw the new policies as evidence of an increasingly confrontational and unpredictable China.

At first, the **Sino-Soviet split** manifested indirectly as criticism towards each other's client states. Then Khrushchev openly denounced China and withdrew Soviet experts and technicians, leading to the cancellation of more than 200 scientific projects intended to foster cooperation between the two nations.

After a series of unconvincing compromises and explicitly hostile gestures, in 1962, the PRC and the USSR finally broke relations.

The split, which lasted until the collapse of the Soviet Union in 1991, was seen by historians as one of the key events of the Cold War, and it had massive consequences for the two powers and for the world.

Lesson Five

History Overview and Assignments Decolonization and the Korean War

THE UNITED STATES and the Soviet Union increasingly competed for influence by proxy in the Third World during the 1950s, at the same time that decolonization was taking place throughout the Third World. The Korean War marked a shift in the focal point of the Cold War, from postwar Europe to East Asia and other Third World nations, as proxy battles were waged for ideological supremacy.

Key People, Places, and Events

Bandung Conference
Gamal Abdel Nasser
Korean War
38th parallel
Kim Il-sung
Pusan Perimeter
Inchon
Korean Armistice Agreement
Korean Demilitarized Zone
Douglas MacArthur



Montage of images from the Korean War. Clockwise from top: US Marines retreating during the Battle of the Chosin Reservoir, UN landing at Incheon, Korean refugees in front of an American M46 Patton tank, US Marines, led by First Lieutenant Baldomero Lopez, landing at Incheon, and an American F-86 Sabre fighter jet

Suggested Reading and Assignments

- Review the discussion questions then read the article: *World: Competition Between East and West*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Do outside research and write an essay on **Mohandas Gandhi and the strategies he employed in his campaigns for India's independence**.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. Outline decolonization events between the end of World War II and 1960.
2. How was the Korean war actually a conflict between the US and USSR?
3. Locate the 38th parallel on the Korean Peninsula on a globe or map. What is the significance of this line?
4. Why did the US become involved when North Korea invaded South Korea?
5. What happened after China became involved?
6. How did the Korean War end, and what were the results?
7. Evaluate the military outcome from Truman and MacArthur's perspectives.

Adapted for High School from:

Boundless World History

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Competition Between East and West

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Background:

Beginning of Decolonization

“The Second World War dealt a serious blow to the colonial powers, depriving them of their former prestige. The Netherlands, Belgium, and France were defeated and occupied. The United Kingdom was seriously depleted. The peoples under colonial rule, often employed to fill the ranks of allied armies in wartime, were determined to break the ties that still held them to Europe, now ruined and stripped of its resources.

Furthermore, the emergence of two anti-colonialist superpowers, the United States and the Soviet Union, and the new international climate after 1945 encouraged the colonies to make a bid for independence. The Charter of the United Nations affirmed its ‘respect for the principle of equal rights and self-determination of peoples.’ The American President, Franklin Roosevelt, and the British Prime Minister, Winston Churchill, had already subscribed to this principle in the Atlantic Charter, which they signed on 14 August 1941 on the American cruiser Augusta, off Newfoundland. In item 3 of this declaration the two Heads of State made the following undertaking: ‘They respect the right of all peoples to choose the form of government under which they will live; and they wish to see sovereign rights and self-government restored to those who have been forcibly deprived of them.’

Decolonization unfolded in two phases. The first lasted from 1945 to 1955, mainly affecting countries in the Near and Middle East, and South-East Asia. The second phase started in 1955 and mainly concerned North Africa and sub-Saharan Africa.

The colonized peoples of South-East Asia were the first to demand the departure of the Europeans and to claim independence. In February 1947, the British decided to leave India. Several months later it gained its independence, but not without suffering violent clashes between the Hindu and Muslim communities. On 15 August 1947, this situation led to the partition of the subcontinent into two separate states: India and Pakistan. In 1948 the United Kingdom also granted independence to Burma and Ceylon, but Malaya had to wait till 1957 to gain the same status.

Meanwhile Indonesia endured four years of military and diplomatic confrontation with the Netherlands, until the Dutch government recognized the independence of the Dutch East Indies in December 1949.

France also had to cope with demands for independence from its colonies. In 1946 it became embroiled in a colonial war in Indochina, waged far from home and to prove costly in human life. Eight years later the conflict ended with the victory of the Viet Minh (League for Independence of Vietnam) over the French forces. The Geneva Accords of 21 July 1954 ended the fighting, obliging France to leave the country. Vietnam was divided into two halves: north of the 17th parallel, the Democratic Republic of Vietnam; and to the south, Vietnam. After proclaiming their independence in 1953, Laos and Cambodia gained full recognition.

Another wave of decolonization swept through the Near and Middle East (Lebanon, Syria) and North Africa (Algeria, Tunisia, and Morocco). The French protectorates in Morocco and Tunisia obtained their independence in 1956 through negotiation, but the situation in Algeria was very different. In 1945 the French army violently repressed the frequent demonstrations of nationalist feeling, fueled by demands for independence. The authorities treated Algeria as an integral part of French territory, and it was only after eight years of savage warfare—lasting from the 1954 uprising to the signing of the Evian Accords in March 1962—that the country finally achieved independence.

*The newly independent countries of Asia and Africa refused to align themselves with the two superpowers. The **Bandung Conference**, in Indonesia, held from 17 to 24 April 1955, brought together some 29 delegates from African and Asian countries. They affirmed their determination to remain independent and non-aligned with respect to either the United States or the Soviet Union. They opposed colonialism and encouraged peoples still under colonial rule to fight for their freedom.*

On 6 March 1957 Ghana, a former British colony, became the first country in sub-Saharan Africa to proclaim its independence. Events followed a similar pattern in nearby French

colonies and in 1960 some 15 new independent states emerged: Guinea (1958), Cameroon, Congo-Brazzaville, Ivory Coast, Dahomey, Gabon, Upper Volta, Madagascar, Mali, Mauritania, Niger, Central African Republic, Senegal, Chad, and Togo. On 30 June 1960 Congo also proclaimed itself independent. The former Belgian colony of Central Africa became the Democratic Republic of Congo.

In Egypt President **Gamal Abdel Nasser**, the leader of the pan-Arab movement, nationalized the Suez Canal Company on 26 July 1956. This direct attack on the interests of France, Britain and Israel triggered the Suez crisis. In October 1956, the stand-off culminated in joint military intervention by the three countries against the former British protectorate. Despite Nasser's military defeat France and Britain were forced to evacuate their expeditionary force, yielding to growing pressure from the United States and the Soviet Union. An international peacekeeping force under the aegis of the United Nations took their place. The Suez crisis ended in a diplomatic fiasco and moral defeat for the two former colonial powers—France and the United Kingdom—while Colonel Nasser emerged as the champion of the Arab cause and decolonization.

In the ten years following the end of the Second World War, with successive waves of decolonization in Asia and Africa, the Third World took its place as a new player in the international arena."

Source: Digital Research in European Studies,
<https://www.cvce.eu/en/recherche/unit-content/-/unit/02bb76df-d066-4c08-a58a-d4686a3e68ff/0397bac4-10f2-4b69-8d1a-366ca4a08c34>

The Korean War

One of the most significant impacts of the US policy of containment during the Cold War was the outbreak of the **Korean War**, when the US came to aid of South Korea against communist North Korea.

In 1910, imperial Japan had annexed Korea, which remained under Japanese rule until the Japanese surrender to the Allies in 1945. Korea was divided at the end of World War II along the **38th parallel** into Soviet and US occupation zones, in which a communist government was installed in the North by the Soviets and an elected government in the South came to power after UN-supervised elections in 1948.

In June 1950, **Kim Il-sung's** North Korean People's Army invaded South Korea. Fearing that communist Korea under a Kim Il Sung dictatorship could threaten Japan and foster other communist

movements in Asia, President Truman committed US forces and obtained help from the United Nations to counter the North Korean invasion.

A joint UN force of personnel from South Korea, the United States, Britain, and numerous other countries joined to stop the invasion. After the first two months of the conflict, South Korean forces were on the point of defeat, forced back to the **Pusan Perimeter**. In September 1950, an amphibious UN counter-offensive was launched at **Inchon** and cut off many of the North Korean troops. Those who escaped envelopment and capture were rapidly forced back north all the way to the border with China at the Yalu River or into the mountainous interior. At this point, in October 1950, Chinese forces crossed the Yalu and entered the war. Chinese intervention triggered a retreat of UN forces that continued until mid-1951.

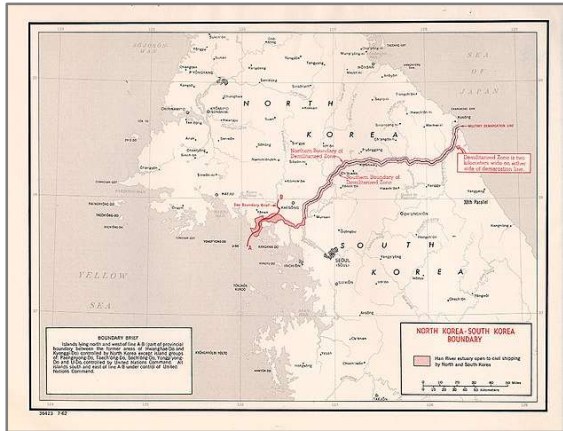


Hundreds of thousands of South Koreans fled south in mid-1950 after the North Korean army invaded.

After these reversals of fortune, which saw Seoul change hands four times, the last two years of conflict became a war of attrition, with the front line close to the 38th parallel. The war in the air, however, was never a stalemate. North Korea was subject to a massive bombing campaign. Jet fighters confronted each other in air-to-air combat for the first time in history, and Soviet pilots covertly flew in defense of their communist allies.

The fighting ended on July 27, 1953, when the **Korean Armistice Agreement** was signed. The agreement created the **Korean Demilitarized Zone** to separate North and South Korea and allowed the return of prisoners. In North Korea, Kim Il-sung created a highly centralized and brutal dictatorship, according to himself unlimited power and generating a formidable cult of personality. However, no peace treaty has ever been signed, and

the two Koreas are technically still at war. Periodic clashes, many of which are deadly, have continued to the present.



Map of the Korean DMZ

Evaluation

The Korean War is seen as one of the most significant impacts of the containment policy of the US government, aimed at preventing the spread of communism, and was one of the major proxy wars of the Cold War.

The war was a political disaster for the Soviet Union. Its central objective, the unification of the Korean peninsula under the Kim Il-Sung regime, was not achieved. Boundaries of both parts of Korea remained practically unchanged. Relations with communist ally China were seriously and permanently spoiled, contributing to the Sino-Soviet split.

The United States' strong resistance to the invasion may have prevented a Soviet intervention in Yugoslavia. The war, meanwhile, united the countries within the capitalist bloc: the Korean War accelerated the conclusion of a peace agreement between the US and Japan, the warming of West Germany's relations with other western countries, and creation of military and political blocs ANZUS (1951) and SEATO (1954). However, because of the war, the authority of the Soviets grew, evident in their readiness to interfere in developing countries of the Third World, many of which went down the socialist path of development after the Korean War

after selecting the Soviet Union as their patron.

The US had entered the Korean War to defend South Korea from a communist invasion. However, the success of the Inchon landing inspired the US and the United Nations to adopt a *rollback* strategy (a proactive strategy designed to force major policy and regime change, as opposed to containment) attempting to overthrow the communist North Korean regime, thus allowing nationwide elections under UN auspices. General **Douglas MacArthur** advanced across the 38th parallel into North Korea.

When the Chinese pushed the UN forces below the 38th parallel, the episode confirmed to Truman's supporters their preference for containment doctrine as opposed to rollback. The Communists were later pushed back to around the original border. Truman blamed MacArthur's focus on victory and adopted a "limited war" policy. His focus shifted to negotiating a settlement, finally reached in 1953. For his part, MacArthur denounced Truman's "no-win policy."



MacArthur commemorative postage stamp

Lesson Six

History Overview and Assignments

The Eisenhower Era

AS PRESIDENT from 1953 to 1961, Dwight Eisenhower oversaw 8 years of relative peace and moderate economic growth at home while his foreign policy initiatives, including US involvement in Southeast Asia, the Middle East, and Africa, shaped the global order for decades to come. His Secretary of State, John Foster Dulles, initiated a “New Look” for the Cold War containment strategy, calling for a greater reliance on nuclear weapons against US enemies in wartime, and promoted the doctrine of “massive retaliation,” threatening a severe response to any Soviet aggression. Highlights of the Eisenhower years include the end of the Korean war and the start of the Civil Rights Movement and the Space Race.



The March on Washington for Jobs and Freedom at the National Mall

Suggested Reading and Assignments

- Review the discussion questions then read the combined article: *The Eisenhower Administration, The Emergence of the Civil Rights Movement, and Policy of Containment.*
- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. Summarize the foreign policies of Eisenhower’s presidency.
2. Summarize his domestic policies.
3. Outline the emergence of the Civil Rights Movement.

Key People, Places, and Events

Dwight Eisenhower
Francisco Franco
SEATO
John Foster Dulles
Allen Welsh Dulles
Ngo Dinh Diem
Republic of Vietnam
Suez Crisis
Eisenhower Doctrine
Cuban Revolution
Fidel Castro
26th of July Movement
Fulgencio Batista

Non-Aligned Movement
Cuban Project
Sputnik
Yuri Gagarin
NASA
Interstate Highway System
Operation Wetback
Immigration and Naturalization Service
Civil Rights Movement
Brown v. Board of Education
NAACP
Montgomery Bus Boycott
Greensboro sit-ins

Selma to Montgomery marches
1963 March on Washington
Rosa Parks
Martin Luther King, Jr.
Ralph Abernathy
Orval Faubus
Little Rock Nine
Civil Rights Act of 1957
Civil Rights Act of 1960
Indian Termination policy
Warren Court
Earl Warren

Adapted for High School from:

Boundless World History

source: courses.lumenlearning.com

The Eisenhower Administration, The Emergence of the Civil Rights Movement, and

Boundless US History

source: courses.lumenlearning.com

Policy of Containment

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Dwight Eisenhower's Administration

Republican: 1953-1961

Dwight Eisenhower was a favorite of New Dealers during the war, especially Franklin D. Roosevelt. Eisenhower repelled Democratic efforts to nominate him in 1948 and 1952 and instead chose to run for the Republican Party nomination in 1952. His goal was to prevent Robert Taft's non-interventionism—including his opposition to NATO—from becoming public policy. Eisenhower's choice for vice president on his ticket was Richard Nixon. He saw Nixon's strong vocal opposition to communism as an asset to his campaign. In the 1952 US presidential election, Eisenhower easily defeated Illinois Governor Adlai Stevenson II and became the first career soldier since Ulysses S. Grant to be elected president.

In the 1956 election, the popular incumbent successfully ran for re-election, winning once again against Democrat Adlai Stevenson.



Official portrait of Dwight D. Eisenhower
White House, Eisenhower Presidential Library

Foreign Affairs

Eisenhower's presidency was dominated by the Cold War and the prolonged confrontation with the Soviet Union. When Joseph Stalin died in 1953,

Eisenhower sought to extend an olive branch to the new Soviet regime in his "Chance for Peace" speech, but continued turmoil in Moscow prevented a meaningful response, and the Cold War deepened.

In 1953 Eisenhower opened relations with Spain under dictator **Francisco Franco**. Despite its undemocratic nature, Spain's strategic position in light of the Cold War and anti-communist position led Eisenhower to build a trade and military alliance with the Spanish through the Pact of Madrid, ultimately bringing an end to Spain's isolation after World War II and bringing about the "Spanish Miracle," an economic boom that lasted into the 1970s.

During his campaign, Eisenhower had promised to end the stalemated Korean War. This promise was fulfilled by the signing of the Korean Armistice Agreement. Defense treaties with South Korea and the Republic of China were signed, and the Southeast Asia Treaty Organization (**SEATO**) alliance was formed in an effort to halt the spread of Communism in Asia.

Eisenhower, working with Secretary of State **John Foster Dulles** and CIA Director **Allen Welsh Dulles**, intensified CIA activities under the pretense of resisting the spread of communism in poorer countries. The CIA in part deposed the leaders of Iran, Guatemala, and possibly the newly independent Republic of the Congo. In the Republic of Congo, the Soviet Union and the KGB had intervened in favor of the popularly elected prime minister. The CIA gave weapons and covert support to pro-Western and Democratic CIA assets. The initial struggle came to a close in December 1960, after those supported by the CIA overthrew the prime minister and proceeded to turn the country (later known as Zaire) into an autocracy, which was unstable long after the end of Eisenhower's term.

Eisenhower also increased US involvement in Southeast Asia. In 1954, he sent Allen Welsh Dulles as a delegate to the Geneva Conference, which ended

the First Indochina War and temporarily partitioned Vietnam into a communist north and a non-communist south. The United States strongly rejected the Geneva Agreement. In February 1955, Eisenhower dispatched the first US soldiers to Vietnam as military advisors to Prime Minister **Ngo Dinh Diem**'s army. After Diem announced the formation of the **Republic of Vietnam** (RVN, commonly known as South Vietnam) in October, Eisenhower immediately recognized the new state and offered military, economic, and technical assistance.

Suez Crisis

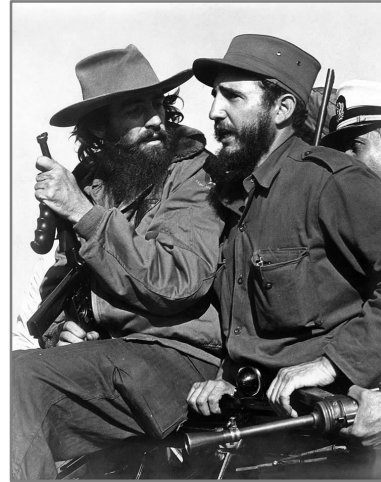
In 1956, Eisenhower warned Britain repeatedly not to use force to regain control of the Suez Canal, which Egypt had nationalized. Regardless, after Britain, France, and Israel went to war with Egypt and seized the canal, Eisenhower used the economic power of the United States to force his European allies to back down and withdraw from Egypt. It not only marked the end of British imperial dominance in the Middle East, but also opened the way for greater US involvement in the region. During his second term, Eisenhower became increasingly involved in Middle Eastern affairs, sending troops to Lebanon in 1958 and promoting the creation of the Baghdad Pact between Iraq, Turkey, Pakistan, and Iran, as well as Britain.

After the **Suez Crisis**, the United States became the protector of unstable friendly governments in the Middle East via the **Eisenhower Doctrine**. Designed by Secretary of State Dulles, it held that the United States would be prepared to employ armed force against "aggression from any country controlled by international communism." The United States would also provide economic and military aid and, if necessary, use military force to stop the spread of communism in the Middle East.

US Response to the Cuban Revolution

The **Cuban Revolution** (1953-59) was an armed revolt conducted by Marxist revolutionary **Fidel Castro's 26th of July Movement** and its allies against the US-backed authoritarian government of Cuban President **Fulgencio Batista**. The revolution began in July 1953 and continued sporadically until the rebels finally ousted Batista on January 1, 1959, replacing his government with a revolutionary socialist state. The movement later reformed along communist lines, becoming the Communist Party in October 1965.

The Cuban Revolution had powerful domestic and international repercussions. In particular, it reshaped Cuba's relationship with the United States. It was one of the first defeats of the US foreign policy in Latin America. In 1961, Cuba became a member of the newly created **Non-Aligned Movement**, which succeeded the 1955 Bandung Conference.



Castro (right) with fellow revolutionary Camilo Cienfuegos entering Havana on 8 January 1959

After the implementation of several economic reforms, including complete nationalization, by Cuba's government, US trade restrictions on Cuba were increased. The United States halted Cuban sugar imports, on which Cuba's economy most heavily depended, and refused to supply its former trading partner with much needed oil, which had a devastating effect on the island's economy. In March 1960, tensions increased when the freighter *La Coubre* exploded in Havana harbor, killing over 75 people. Castro blamed the United States and compared the incident to the 1898 sinking of the USS *Maine* (ACR-16), which had precipitated the Spanish-American War, though admitting he could provide no evidence for his accusation. That same month, Eisenhower authorized the CIA to organize, train, and equip Cuban refugees as a guerrilla force to overthrow Castro.

Each time the Cuban government nationalized US properties, the US government took countermeasures, resulting in prohibition of all exports to Cuba. Consequently, Cuba began to consolidate trade relations with the Soviet Union, leading the United States to break off all remaining official diplomatic relations. The United States began the formulation of secret plans, collectively known as the **Cuban Project** (also called Operation Mongoose), aimed at destabilizing the Cuban

government. This developed into a coordinated program of political, psychological, and military sabotage, involving intelligence operations as well as assassination attempts on key political leaders.

Early Space Race

The Space Race originated from the missile-based nuclear arms race between the United States and the Soviet Union that occurred following World War II, as both countries sought to recruit German engineers who worked on ballistic missile programs that could be utilized to launch objects into space. Americans were astonished when Soviets were the first to launch a satellite (*Sputnik*) into space on October 4, 1957. The Soviet Union also later beat the United States in sending the first human into space, **Yuri Gagarin**, on April 12, 1961.

Eisenhower came under heavy criticism after the *Sputnik* launch, and his administration responded to this crisis with many strategic initiatives, including the creation of the National Aeronautics and Space Administration (**NASA**) in 1958 and a speeding up of the US space program. Under Eisenhower, NASA's human spaceflight program started and visionary projects such as Saturn and the F-1 rocket engine were funded. Those initiatives were necessary for success in the subsequent administrations' effort to win the Space Race.



30k USSR stamp depicting Sputnik 1 orbiting the Earth, the Earth orbiting the Sun and the Sun orbiting the center of the Milky Way galaxy

Domestic Affairs

Democrats attacked Eisenhower for not taking a public stand against Senator Joseph McCarthy's

anti-communist campaigns. Privately he held McCarthy and his tactics in contempt and worked behind the scenes to weaken McCarthy, in particular by putting together a task force to oversee the defense of the Army, leading to the pivotal Army-McCarthy hearings that led to McCarthy's downfall in 1954.

Eisenhower was a conservative whose policy views were close to those of Taft. They agreed that a free enterprise economy should run itself. He did not attempt to roll back the New Deal; he expanded Social Security. His major project was building the **Interstate Highway System** using federal gasoline taxes. While his 1952 landslide victory gave the Republicans control of both houses of the Congress, Eisenhower believed that taxes could not be cut until the budget was balanced.

On June 17, 1954, Eisenhower launched **Operation Wetback** in response to increasing illegal immigration to the United States. As many as three million illegal immigrants had crossed the US-Mexico border to work in California, Arizona, Texas, and other states. Eisenhower opposed this movement, believing that it lowered the wages of US workers and led to corruption. The **Immigration and Naturalization Service** sent about 80,000 immigrants back to Mexico.

Emergence of the Civil Rights Movement

The early **Civil Rights Movement** encompassed social movements aimed at ending racial segregation and discrimination against African Americans and securing legal recognition and federal protection of the citizenship rights enumerated in the Constitution and federal law. While African Americans had been fighting for their rights and liberties since the time of slavery, the Eisenhower years witnessed critical early accomplishments in their civil rights struggle.

A critical Supreme Court decision of this phase of the Civil Rights Movement was the 1954 ruling in **Brown v. Board of Education**. In the spring of 1951, African American students in Virginia protested their unequal status in the state's segregated educational system. Students at Moton High School protested the overcrowded conditions and failing facilities. Some local leaders of the National Association for the Advancement of Colored People (**NAACP**) had tried to persuade the students to back down from their protest against the Jim Crow laws of school segregation. When the students did not budge, the NAACP joined their

battle against school segregation. The NAACP proceeded with five cases challenging the school systems; these were later combined under what is known today as *Brown v. Board of Education*. On May 17, 1954, the Supreme Court ruled unanimously that mandating, or even permitting, public schools to be segregated by race was unconstitutional. However, the new law raised controversy.

The early Civil Rights movement was characterized by major campaigns of civil resistance. Beginning in 1955, acts of nonviolent protest and civil disobedience produced crisis situations between activists and government authorities. Federal, state, and local governments, businesses, and communities often had to respond immediately to these situations that highlighted the discrimination African Americans faced. Actions included boycotts such as the successful **Montgomery Bus Boycott** in Alabama, sit-ins such as the influential **Greensboro sit-ins**, marches such as the **Selma to Montgomery marches** in Alabama and the **1963 March on Washington**, as well as a wide range of other nonviolent activities.



Civil Rights March on Washington, DC: Leaders marching from the Washington Monument to the Lincoln Memorial

The Montgomery bus boycott was a political and social protest campaign against the policy of racial segregation on the Montgomery, Alabama public transit system. The campaign lasted from December 5, 1955, when **Rosa Parks**, an African American woman, was arrested for refusing to surrender her seat to a white person, to December 20, 1956, when a federal ruling, *Browder v. Gayle*, took effect and led to a Supreme Court decision that declared the Alabama and Montgomery laws requiring segregated buses to be unconstitutional. Many important figures in the Civil Rights Movement took part in the boycott, including the Reverend **Martin Luther King, Jr.** and **Ralph Abernathy**.



Rosa Parks being fingerprinted after being arrested for not giving up her seat on a bus to a white person

The Greensboro sit-ins were a series of nonviolent protests in Greensboro, North Carolina, in 1960, which led to the Woolworth department store chain removing its policy of racial segregation in the southern United States. While not the first sit-in of the Civil Rights Movement, the Greensboro sit-ins were an instrumental action, and the most well-known sit-ins of the movement. They led to increased national sentiment at a crucial period in US history. The primary event took place at the Greensboro Woolworth store; a site that is now the International Civil Rights Center and Museum.

As late as 1957, which was three years after the *Brown v. Board of Education* decision, a crisis erupted in Little Rock, Arkansas, when Arkansas Governor Arkansas **Orval Faubus** called out the National Guard to prevent entry to the nine African American students who had sued for the right to attend an integrated school, Little Rock Central High School. The group of students had been chosen to attend because of their excellent grades.

Faubus' resistance received the attention of President Dwight Eisenhower, who was determined to enforce the orders of the federal courts. Critics had charged Eisenhower was lukewarm, at best, on the goal of desegregation of public schools, but he federalized the National Guard in Arkansas and ordered them to return to their barracks. He also deployed elements of the 101st Airborne Division to Little Rock to protect the students. The soldiers escorted nine African-American students, who became known as the **Little Rock Nine**, to Little Rock Central High School.

Eisenhower also proposed to Congress two civil rights acts and signed those acts into law.

The **Civil Rights Act of 1957** for the first time established a permanent civil rights office inside the Justice Department and a Civil Rights Commission to hear testimony about voting rights abuses. The **Civil Rights Act of 1960** established federal inspection of local voter registration polls and introduced penalties for anyone who obstructed someone's attempt to register to vote.



A photograph of Elizabeth Eckford attempting to enter Little Rock School on September 4, 1957

Although both acts were much weaker than subsequent civil rights legislation, they constituted the first significant civil rights acts since 1875.

Native American Policy

Controversial Native American policy during the Eisenhower years sought to assimilate Native Americans into mainstream US society. In practice, the **Indian Termination policy**, which had begun in the 1940s, terminated the government's recognition of tribal sovereignty, trusteeship of Indian reservations, and exclusion of Native Americans from state laws. Termination began with a series of laws directed at dismantling tribal sovereignty. A House resolution announced the federal policy of termination and called for immediate ending of the federal relationship with a selected group of tribes. By the 1960s, 109 tribes were terminated.

In addition to ending the tribal rights as

sovereign nations, the policy terminated federal support of most of the health care and education programs, utility services, and police and fire departments available to Native Americans on reservations.

Termination had disastrous effects on Native Americans. They struggled with poverty and unemployment and lost access to education and health care. The loss of culture and community was also a critical effect.

Warren Court

The **Warren Court** refers to the Supreme Court of the United States between 1953 and 1969, when **Earl Warren** served as chief justice.

*Warren led a liberal majority that employed **judicial activism** (in which the law and Constitution are interpreted broadly in order to address perceived problems) in dramatic fashion, to the consternation of many conservative opponents.*

The Warren Court expanded civil rights, civil liberties, judicial power, and federal power. The court was both lauded and criticized for the strategies it employed in seeking to bring an end to racial segregation in the United States, as well as for incorporating the Bill of Rights (i.e., applying it to states) and ending officially sanctioned voluntary prayer in public schools. Prominent justices of the Court during the Warren era, besides the chief justice himself, included William J. Brennan, Jr., William O. Douglas, Hugo Black, Felix Frankfurter, and John Marshall Harlan II.



The United States Supreme Court in 1953. Bottom from left: Felix Frankfurter; Hugo Black; Earl Warren (Chief Justice); Stanley Reed; William O. Douglas. Back from left: Tom Clark; Robert H. Jackson; Harold Burton; Sherman Minton

The Artios Home Companion Series

Unit 22: The Civil Rights Movement - Part One

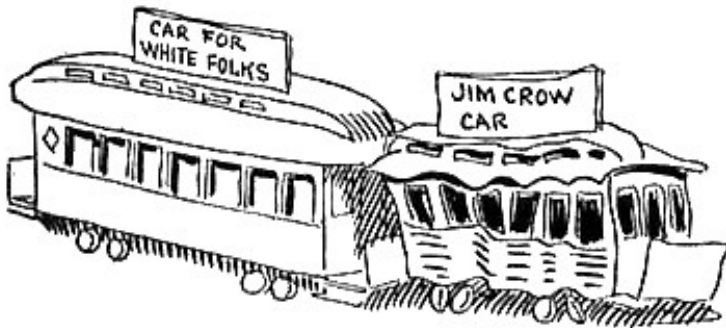
Teacher Overview

THE AMERICAN SOUTH emerged from the Civil War with a system of laws that undermined the freedom of African Americans and preserved many elements of white privilege. No major successful attack was launched on the segregation system until the 1950s. Beginning with the Supreme Court's school integration ruling of 1954 in *Brown v. Board of Education*, the American legal system seemed sympathetic to African Americans demanding that their Fourteenth Amendment civil rights be protected. Soon, a peaceful equality movement began under the unofficial leadership of Dr. Martin Luther King, Jr. A wave of marches, boycotts, sit-ins, and freedom rides swept the American South and even parts of the North. Public opinion polls across the nation and the world revealed a great deal of sympathy for African Americans. The Eisenhower, Kennedy, and Johnson administrations gave the Civil Rights Movement at least tacit support. Although many obstacles to complete racial equity remained, by 1965 most legal forms of discrimination had been abolished. Legal equality did not bring economic equality and social acceptance, though. On the contrary, a radical wing of the movement grew stronger and stronger during the 1960s. Influenced by Malcolm X, the Black Power Movement rejected the policy of nonviolence and even believed integration was not a desirable short-term goal. Black nationalists called for the establishment of a nation of African Americans dependent on each other for support without the interference or help of whites. Race-related violence began to spread across the country. Beginning in 1964, a series of "long, hot summers" of rioting plagued urban centers. More and more individuals dedicated to African American causes became victims of assassination. Medgar Evers, Malcolm X, and Martin Luther King, Jr. were a few of the more famous casualties of the tempest.

Suggested Assignments

In this unit, students will:

- Complete three lessons in which they will learn about the **start of the Civil Rights Movement**, journaling and answering discussion questions as they read.
- Define vocabulary words.
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.



1904 caricature of "White" and "Jim Crow" rail cars by John T. McCutcheon. Despite Jim Crow's legal pretense that the races be "separate but equal" under the law, non-whites were given inferior facilities and treatment.

Leading Ideas

God created all human beings equal in His sight. Although we may have different and individual God-ordained purposes, God sees us as equal.

There is neither Jew nor Greek, there is neither slave nor free, there is no male and female, for you are all one in Christ Jesus.

– Galatians 3:28 (review)

"You shall do no injustice in court. You shall not be partial to the poor or defer to the great, but in righteousness shall you judge your neighbor.

– Leviticus 19:15

"The rich and the poor have this in common: the LORD is the maker of them all."

– Proverbs 22:2

Lesson One

History Overview and Assignments A Segregated America



Sign for the “colored” waiting room at a bus station in Durham, North Carolina, May 1940

Key People, Places, and Events

Jim Crow laws
Plessy v. Ferguson
“separate but equal”

Vocabulary

segregation
disenfranchisement
poll-tax

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article: *A Segregated America*.
- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. Describe what the author means when he says that African Americans were being forced to live divided lives. What term was used to describe this divided life?
2. To what does the term disenfranchisement refer?
3. Describe how the various methods used to disenfranchise African Americans kept them from being able to vote. Be specific. Do not just repeat what the text says.

Adapted for High School from:
United States History II
source: courses.lumenlearning.com
A Segregated America
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Black Americans During the Progressive Era

African Americans had initially been hopeful during Reconstruction after the Civil War. The Thirteenth Amendment ended slavery in the United States, the Fourteenth Amendment guaranteed equal protection under the law and the rights of citizens, and the Fifteenth Amendment granted Black male suffrage. African Americans were elected to local, state, and even national offices, and Congress passed civil rights legislation. However, the hopes of Reconstruction were dashed by horrific waves of violence against African Americans, the economic struggles of sharecropping (which, in some ways, resembled the conditions of slavery), the

denial of equal civil rights including voting rights, and enforced **segregation** of the races. At the turn of the century, the new progressive reform movement heralded many changes, but whether African Americans would benefit from progressivism remained to be seen.

America’s tragic racial history was not erased by the Progressive Era. In fact, in all too many ways, reform removed African Americans ever farther from American public life. Racial mob violence against African Americans permeated much of the “New South”—and, to a lesser extent, the West, where Mexican Americans and other immigrant groups also suffered severe discrimination and

violence—by the late nineteenth century. The Ku Klux Klan and a system of **Jim Crow laws** governed much of the South. White middle-class reformers were appalled at the violence of race relations in the nation but typically shared the belief in racial characteristics and the superiority of Anglo-Saxon White people over African Americans, Asians, “ethnic” Europeans, Indians, and Latin American populations. Southern reformers considered segregation a Progressive solution to racial violence; across the nation, educated middle-class Americans enthusiastically followed the work of eugenicists who identified virtually all human behavior as inheritable traits and issued awards at county fairs to families and individuals for their “racial fitness.”

Disenfranchisement

In the South, electoral politics remained a parade of electoral fraud, voter intimidation, and race-baiting. Democratic Party candidates stirred southern Whites into frenzies with warnings of “negro domination” and of Black men violating White women. The region’s culture of racial violence and the rise of lynching as a mass public spectacle accelerated. And as the remaining African American voters threatened the dominance of Democratic leadership in the South, southern Democrats turned to what many White southerners understood as a series of progressive electoral and social reforms—**disenfranchisement** and segregation. Just as reformers would clean up politics by taming city political machines, White southerners would “purify” the ballot box by restricting Black voting, and they would prevent racial strife by legislating the social separation of the races.

The question was how the southern states would accomplish disenfranchisement. The Fifteenth Amendment clearly prohibited states from denying any citizen the right to vote on the basis of race. In 1890, a Mississippi state newspaper called on politicians to devise “some legal defensible substitute for the abhorrent and evil methods on which White supremacy lies.” The state’s Democratic Party responded with a new state constitution designed to purge corruption at the ballot box through disenfranchisement. African Americans hoping to vote in Mississippi would have to jump through a series of hurdles designed with the explicit purpose of excluding them from political power:

- The state first established a **poll tax**, which required voters to pay for the privilege of voting.
- Second, it stripped suffrage from those convicted

of petty crimes most common among the state’s African Americans. Keep in mind, many Black people were unjustifiably charged with crimes.

- Next, the state required voters to pass a literacy test. Local voting officials, who were themselves part of the local party machine, were responsible for judging whether voters were able to read and understand a section of the Constitution. In order to protect illiterate White people from exclusion, the so-called “understanding clause” allowed a voter to qualify if they could adequately explain the meaning of a section that was read to them.

In practice, these rules were systematically abused to the point where local election officials effectively wielded the power to permit and deny suffrage at will. The disenfranchisement laws effectively moved electoral conflict from the ballot box, where public attention was greatest, to the voting registrar, where supposedly color-blind laws allowed local party officials to deny the ballot without the appearance of fraud.

Segregation in the Jim Crow South

At the same time, the South’s Democratic leaders were adopting the tools to disenfranchise the region’s Black voters, these same legislatures were constructing a system of racial segregation even more pernicious. While it was built on earlier practice, segregation was primarily a modern and urban system of enforcing racial subordination and deference.

As with disenfranchisement, segregation violated a plain reading of the Constitution—in this case, the Fourteenth Amendment. Here the Supreme Court intervened, ruling in the Civil Rights Cases (1883) that the Fourteenth Amendment only prevented discrimination directly by states. It did not prevent discrimination by individuals, businesses, or other entities. Southern states exploited this interpretation with the first legal segregation of railroad cars in 1888.

Plessy v. Ferguson

In a case that reached the Supreme Court in 1896, New Orleans resident Homer Plessy challenged the constitutionality of Louisiana’s segregation of streetcars. The court ruled against Plessy and, in the process, established the legal principle of “**separate but equal.**” Racially segregated facilities were legal provided they were equivalent. In practice, this was almost never the case. The court’s majority defended its position with

logic that reflected the racial assumptions of the day. “If one race be inferior to the other socially,” the court explained, “the Constitution of the United States cannot put them upon the same plane.” Justice John Harlan, the lone dissenter, countered, “Our Constitution is color-blind, and neither knows nor tolerates classes among citizens. In respect of civil rights, all citizens are equal before the law.” Harlan went on to warn that the court’s decision would “permit the seeds of race hatred to be planted under the sanction of law.” In their rush to fulfill Harlan’s prophecy, southern White people codified and enforced the segregation of public spaces.

Segregation was built on a fiction—that there could be a White South socially and culturally distinct from African Americans. Its legal basis

rested on the constitutional fallacy of “separate but equal.” Southern Whites erected a bulwark of White supremacy that would last for nearly sixty years. Segregation and disenfranchisement in the South rejected Black citizenship and relegated Black social and cultural life to segregated spaces. African Americans lived divided lives, acting the part White people demanded of them in public, while maintaining their own world apart from White people. This segregated world provided a measure of independence for the region’s growing Black middle class, yet at the cost of poisoning the relationship between Black and White. Segregation and disenfranchisement created entrenched structures of racism that completed the total rejection of the promises of Reconstruction.

Lesson Two

History Overview and Assignments Leaders Emerge in the Civil Rights Movement



W.E.B. Du Bois in 1918

Suggested Reading and Assignments

- Review the discussion questions, then read the article: *Leaders Emerge in the Civil Rights Movement*.
- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

Booker T. Washington
New South

W.E.B. Du Bois
“talented tenth”

Declaration of Principles

Discussion Questions

1. What similarities and differences were there between Booker T. Washington and W.E.B. Du Bois?
2. Describe who you think W.E.B. Du Bois was referring to when he mentioned the “talented tenth?”
3. Read the Declaration of Principles. The link is found on the **ArtiosHCS** site for this unit. Choose three points that you wish to discuss in class. Be sure you have chosen specific reasons you wish to discuss what you have chosen.

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Leaders Emerge in the Civil Rights Movement

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Booker T. Washington

Born into the world of bondage in Virginia in 1856, **Booker Taliaferro Washington** was subjected to the degradation and exploitation of slavery early in life. But Washington also developed an insatiable thirst to learn. Working against tremendous odds, Washington matriculated into Hampton University in Virginia and thereafter established a Southern institution that would educate many Black Americans, the Tuskegee Institute, located in Alabama. Washington was Tuskegee's president from 1881 until his death in 1915. Tuskegee was an all-Black "normal school"—an old term for a teachers' college—teaching African Americans a curriculum geared towards practical skills such as cooking, farming, and housekeeping. Graduates would often then travel through the South, teaching new farming and industrial techniques to rural communities. Washington extolled the school's graduates to focus on the Black community's self-improvement and prove that they were productive members of society even in freedom—something White Americans throughout the nation had always doubted.

Washington envisioned that Tuskegee's contribution to Black life would come through industrial education and vocational training. He believed that such skills would help African Americans accomplish economic independence while developing a sense of self-worth and pride of accomplishment, even while living within the putrid confines of Jim Crow. Washington poured his life into Tuskegee, and thereby connected with leading white philanthropic interests. Individuals such as Andrew Carnegie, for instance, financially assisted Washington and his educational ventures.

In a speech delivered at the Cotton States and International Exposition in Atlanta in 1895, which was meant to promote the economy of a "**New South**," Washington proposed what came to be known as the Atlanta Compromise. Speaking to a racially mixed audience, Washington called upon African Americans to work diligently for their own uplift and prosperity rather than preoccupy themselves with political and civil rights. Their success and hard work, he implied, would eventually

convince southern Whites to grant these rights. In the same speech, delivered one year before the Supreme Court's *Plessy v. Ferguson* decision that legalized segregation under the "separate but equal" doctrine, Washington said to White Americans, "In all things that are purely social we can be as separate as the fingers, yet one as the hand in all things essential to mutual progress."



In Booker T. Washington's speech at the Cotton States and International Exposition in Atlanta, he urged his audience to "cast down your bucket where you are" and make friends with the people around them.

Not surprisingly, most White people liked Washington's model of race relations, since it placed the burden of change on Black people and required nothing of them. Wealthy industrialists such as Andrew Carnegie and John D. Rockefeller provided funding for many of Washington's self-help programs, as did Sears, Roebuck & Co. co-founder Julius Rosenwald, and Washington was the first African American invited to the White House by President Roosevelt in 1901. At the same time, his message also appealed to many in the Black community, and some attribute this widespread popularity to his consistent message that social and economic growth, even within a segregated society, would do more for African Americans than an all-out agitation for equal rights on all fronts.

Washington was both praised as a race leader and pilloried as an accommodationist to America's unjust racial hierarchy; his public advocacy of a conciliatory posture toward white supremacy concealed the efforts to which he went to assist African Americans in the legal and economic quest for racial justice. In addition to founding Tuskegee, Washington also published a handful of influential books, including the autobiography *Up from Slavery* (1901).

W.E.B. Du Bois

Yet, many African Americans disagreed with Washington's approach. Much in the same manner that Alice Paul felt the pace of the struggle for women's rights was moving too slowly under the NAWSA, some within the African American community felt that immediate agitation for the rights guaranteed under the Thirteenth, Fourteenth, and Fifteenth Amendments, established during the immediate aftermath of the Civil War, was necessary. In 1905, a group of prominent civil rights leaders, led by **W.E.B. Du Bois**, met in a small hotel on the Canadian side of Niagara Falls—where segregation laws did not bar them from hotel accommodations—to discuss what immediate steps were needed for equal rights. Du Bois, a professor at the all-Black Atlanta University and the first African American with a doctorate from Harvard, emerged as the prominent spokesperson for what would later be dubbed the Niagara Movement. By 1905, he had grown wary of Booker T. Washington's calls for African Americans to accommodate White racism and focus solely on self-improvement. Du Bois, and others alongside him, wished to carve a more direct path towards equality that drew on the political leadership and litigation skills of the Black, educated elite, which he termed the “**talented tenth**.”

At the meeting, Du Bois led the others in drafting the “Declaration of Principles,” which called for immediate political, economic, and social equality for African Americans. These rights included universal suffrage, compulsory education, and the elimination of the convict lease system in which tens of thousands of blacks had endured slavery-like conditions in southern road construction, mines, prisons, and penal farms since the end of Reconstruction. Within a year, Niagara chapters had sprung up in twenty-one states across the country. By 1908, internal fights over the role of women in the

fight for African American equal rights lessened the interest in the Niagara Movement. But the movement laid the groundwork for the creation of the National Association for the Advancement of Colored People (NAACP), founded in 1909. Du Bois served as the influential director of publications for the NAACP from its inception until 1933. As the editor of the journal *The Crisis*, Du Bois had a platform to express his views on a variety of issues facing African Americans in the later Progressive Era, as well as during World War I and its aftermath.



This photo of the Niagara Movement shows W.E.B. Du Bois seated in the second row, center, in the white hat. The proud and self-confident postures of this group stood in marked contrast to the humility that Booker T. Washington urged of Black people.

In both Washington and Du Bois, African Americans found leaders to push forward the fight for their place in the new century, each with a very different strategy. Both men cultivated ground for a new generation of African American spokespeople and leaders who would then pave the road to the modern civil rights movement after World War II.

Lesson Three

History Overview and Assignments Civil Rights Milestones

Key People, Places, and Events

Irene Morgan
Morgan v. Commonwealth of Virginia
Shelley v. Kraemer
Sweatt v. Painter

Herman Marion Sweatt
Sarah Keys
Sarah Keys v. Carolina Coach Company

Jackie Robinson
Alice Coachman



PFC Sarah Louise Keys,
known for refusing to give up
her bus seat in 1952.

Suggested Reading and Assignments

- Review the discussion questions then read two articles: *Introduction to Civil Rights Milestones of the 1950's* and *Early Victories for Civil Rights*
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. What role did the supreme court play in protecting the rights of African Americans?
2. Watch the video on the Levittown Crisis. Write a journal entry about the emotions you felt while listening to the various people's response to the integration of their town.
3. What role did societal pressure and peer pressure play in how Jackie Robinson's manager treated him?

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Introduction to Civil Rights Milestones of the 1950's

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Introduction to Civil Rights Milestones of the 1950's

African Americans had been fighting against a variety of racist policies, cultures, and beliefs in all aspects of American life. While the struggle for Black inclusion had faced many setbacks in the prewar period, the Double V campaign for victory, waged against "fascism abroad and racism at home," as well as the national postwar economic boom, led to rising expectations for many African Americans. When persistent racism and racial segregation undercut the promise of economic and social mobility, African Americans began mobilizing on an unprecedented scale against the various discriminatory social and legal structures.

While many of the civil rights movement's most memorable and important moments, such as the sit-ins, the Freedom Rides, and especially the March on Washington, occurred in the 1960s, the 1950s were also a significant decade in the sometimes tragic, sometimes triumphant march of civil rights in the United States.

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Early Victories for Civil Rights

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In the aftermath of World War II, Black Americans began to mount an organized resistance to the racially discriminatory policies in force throughout much of the United States. In the South, they used a combination of legal challenges and grassroots activism to begin dismantling the racial segregation that had stood for nearly a century following the end of Reconstruction. Community activists and civil rights leaders targeted racially discriminatory housing practices, segregated transportation, and legal requirements that Black people and White people be educated separately. While many of these challenges were successful, life did not always improve for Black people. Hostile White people fought these changes in any way they could, including by resorting to violence.

Early Victories

During World War II, many Black Americans had supported the “Double V Campaign,” which called on them to defeat foreign enemies while simultaneously fighting against segregation and discrimination at home. After World War II ended, many returned home to discover that, despite their sacrifices, the United States was not willing to extend them greater rights than they had enjoyed before the war. Particularly rankling was the fact that although Black veterans were legally entitled to draw benefits under the GI Bill, discriminatory practices prevented them from doing so. For example, many banks would not give them mortgages if they wished to buy homes in predominantly Black neighborhoods, which banks often considered too risky an investment. However, Black Americans who attempted to purchase homes in White neighborhoods often found themselves unable to do so because of real estate covenants that prevented owners from selling their property to Black buyers. Indeed, when a Black family purchased a Levittown house in 1957, they were subjected to harassment and threats of violence.

The postwar era, however, saw Black Americans make greater use of the courts to defend their rights. In 1944, a Black woman, Irene Morgan, was arrested in Virginia for refusing to give up her seat on an interstate bus and sued to have her conviction overturned. In *Morgan v. Commonwealth of Virginia* in 1946, the Supreme Court ruled that the conviction should be overturned because it violated the interstate commerce clause of the Constitution. This victory emboldened some civil rights activists to launch the Journey of Reconciliation, a bus trip taken by eight Black men and eight White men

through the states of the Upper South to test the South’s enforcement of the *Morgan* decision.

Other victories followed. In 1948, in *Shelley v. Kraemer*, the Supreme Court held that courts could not enforce real estate covenants that restricted the purchase or sale of property based on race. In 1950, the NAACP brought a case before the Supreme Court that they hoped would help to undermine the concept of “separate but equal” as espoused in the 1896 decision in *Plessy v. Ferguson*, which gave legal sanction to segregated schools. *Sweatt v. Painter* was a 1950 case brought by Herman Marion Sweatt, who sued the University of Texas for denying him admission to its law school because state law prohibited integrated education. Texas attempted to form a separate law school for Black people only, but in its decision on the case, the Supreme Court rejected this solution, holding that the separate school provided neither equal facilities nor “intangibles,” such as the ability to form relationships and thus establish a network with other future lawyers, something a professional school should provide.

In 1953, years before Rosa Parks’s iconic confrontation on a Montgomery city bus, a Black woman named Sarah Keys publicly challenged segregated public transportation. Keys, then serving in the Women’s Army Corps, traveled from her army base in New Jersey back to North Carolina to visit her family. When the bus stopped in North Carolina, the driver asked her to give up her seat for a White customer. Her refusal to do so landed her in jail in 1953 and led to a landmark 1955 decision, *Sarah Keys v. Carolina Coach Company*, in which the Interstate Commerce Commission ruled that “separate but equal” violated the Interstate Commerce Clause of the Constitution. Poorly enforced, it nevertheless gave legal coverage for the Freedom Riders years later and motivated further challenges to Jim Crow.

The primary factors for migration from the South included segregation, widespread racial violence, and a lack of opportunity. In the North, African Americans could find better schools and adult men could vote (joined by women after 1920). Cities that had been virtually all white at the start of the century became centers of African American culture and politics by the middle of the century. Segregation still imposed severe economic and social costs but allowed northern cultural centers to develop an important infrastructure of newspapers, businesses, jazz clubs, churches, and political

organizations that provided the staging ground for new forms of racial politics and African American culture.

Groundbreaking Athletes

Not all efforts to enact desegregation required the use of the courts. On April 15, 1947, Jackie Robinson started for the Brooklyn Dodgers, playing first base. He was the first African American to play baseball in the National League, breaking the color barrier. Although Black people had their own baseball teams in the Negro Leagues, Robinson opened the gates for them to play in direct competition with White players in the major leagues. Other African American athletes also began to challenge the segregation of American sports. At the 1948 Summer Olympics, Alice Coachman, a Black woman, was the only American woman to take a gold medal in the games. These changes, while symbolically significant, were mere cracks in the wall of segregation.

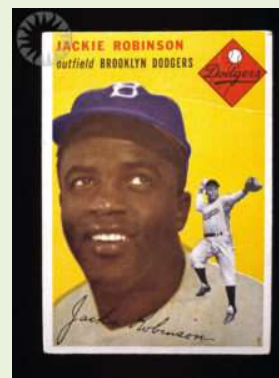
The Long Reach of Jim Crow

As in other aspects of postwar American life, the world of sports was often segregated by race. Irrespective of individual talent, Black players were limited to the teams of the Negro leagues, an organization with roots in the late nineteenth century. In 1946, Brooklyn Dodgers manager Branch Rickey began scouting the leagues for a player of exceptional ability that he might sign. Complicating his goal was the system of laws and rules known as Jim Crow that relegated Black Americans to a separate and unequal position in much of the United States. While part of Jim Crow was based on laws enforceable by the state, another part was a matter of social convention and dubious “tradition,” such as the imperative for a Black man to step off a sidewalk to make way for White passersby. While there was not necessarily a law requiring such deference, as indicated by the “Whites Only” signs in certain sections of a 1950s Alabama bus, for example, the deeply embedded racism that informed such conventions was every bit as destructive and demeaning. Given that these non-judicial segregationist norms existed in a grey area, it is all the more striking when they were upheld in situations when they might instead have been waived or at least challenged without legal consequence.

After Rickey brought Jackie Robinson onto the Montreal Royals, a part of the International League and a farm team to the Dodgers, Robinson was likely unsurprised to be denied restaurant service or a seat on segregated buses in the

environs of Sanford, Florida, where his team was beginning spring training. At one point, Robinson and his wife, along with another Black player and several journalists from the traditionally Black newspaper The Pittsburgh Courier, had to be relocated from a Daytona hotel where they were under threat to the more secure private home of an accommodating Black family. Elsewhere in Florida, Robinson was unable to play baseball, as owners called off games, locked ballfields, or called the police when he took the field. In some instances, these actions were supported by Jim Crow laws; in others, they were judgment calls made in the moment and based on nothing more than hateful social norms.

The long reach of Jim Crow could also intrude abroad, where its legal status was tenuous but its stubborn durability in the form of simple prejudice was often a given. When Robinson went to Cuba for a Dodgers and Royals training camp, he and other players of color thought they would be comparatively better treated, but Rickey still put them up in sub-par lodgings away from the finer hotel of the White players—not because he had to by law, but because he wanted to avoid the possibility of local confrontation. Later, while playing a series of exhibition games in the Canal Zone of Panama, legally United States territory within a foreign country, Robinson found himself subject to Jim Crow laws and was required to lodge outside of the Zone where these laws did not apply. Even when traveling in a foreign country and for the sake of one’s livelihood, the jurisdiction of Jim Crow could still do its insidious work on a technicality.



Topps Jackie Robinson baseball card, No. 10 (1954). In 1949, Robinson and Cleveland Indians’ Larry Doby and Satchel Paige became the first Black players to appear on baseball cards. Baseball cards were introduced in 1886 by Allen and Ginter Tobacco Company, which packaged their cigarettes with picture cards of sports figures.

Desegregation would come slowly to professional baseball, with the Boston Red Sox becoming the last major league team to sign a Black player in 1959.

The Artios Home Companion Series

Unit 23: The Civil Rights Movement - Part Two

Teacher Overview

“A lie doesn't become truth, wrong doesn't become right, and evil doesn't become good, just because it's accepted by a majority.”

– Booker T. Washington

“Either the United States will destroy ignorance or ignorance will destroy the United States.”

– W.E.B. Du Bois in his “Niagara Movement Speech,” 1905

“Darkness cannot drive out darkness; only light can do that. Hate cannot drive out hate; only love can do that.”

– Martin Luther King, Jr.

“Injustice anywhere is a threat to justice everywhere. We are caught in an inescapable network of mutuality, tied in a single garment of destiny. Whatever affects one directly, affects all indirectly.”

– Martin Luther King, Jr. in “Letter From a Birmingham Jail

“Where you see wrong or inequality or injustice, speak out, because this is your country. This is your democracy. Make it.”

– Martin Luther King, Jr.

“I wish I could say that racism and prejudice were only distant memories. We must dissent from the indifference. We must dissent from the apathy. We must dissent from the fear, the hatred, and the mistrust... We must dissent because America can do better, because America has no choice but to do better.”

– Thurgood Marshall

“The heart of the question is whether all Americans are to be afforded equal rights and equal opportunities; whether we are going to treat our fellow Americans as we want to be treated.”

– John F. Kennedy

“Today, we are committed to a worldwide struggle to promote and protect the rights of all who wish to be free. . . . It ought to be possible, in short, for every American to enjoy the privileges of being American without regard to his race or his color.”

– John F. Kennedy

“We are one people, one family, the human family, and what affects one of us affects us all.”

– John Lewis, *Across That Bridge: Life Lessons and a Vision for Change*



Civil Rights March on Washington: leaders marching from the Washington Monument to the Lincoln Memorial

Suggested Assignments

In this unit, students will:

- Complete three lessons in which they will learn more about the **Civil Rights Movement**, journaling and answering discussion questions as they read.
- Define a vocabulary word.
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

God created all human beings equal in His sight. Although we may have different and individual God-ordained purposes, God sees us as equal.

There is neither Jew nor Greek, there is neither slave nor free, there is no male and female, for you are all one in Christ Jesus.

– Galatians 3:28 (review)

“You shall do no injustice in court. You shall not be partial to the poor or defer to the great, but in righteousness shall you judge your neighbor.

– Leviticus 19:15

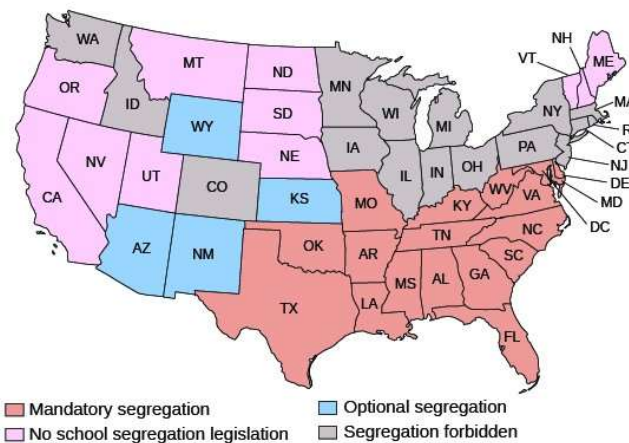
“The rich and the poor have this in common: the LORD is the maker of them all.”

– Proverbs 22:2

Lesson One

History Overview and Assignments A Segregated America

U.S. School Segregation prior to *Brown v. Board of Education*



Key People, Places, and Events

Thurgood Marshall
Brown v. Board of Education of Topeka, Kansas
Little Rock Nine
States' Rights
Emmett Till
Montgomery Bus Boycott
Rosa Parks
Martin Luther King, Jr.

Vocabulary

desegregation

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read the article: *Desegregation and Integration*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Define the vocabulary word in the context of the reading. Write the word and its definition in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. Interview someone that experienced school desegregation while growing up. Record the interview and then journal about it. Come up with several questions before the interview to help the interview flow smoothly. Focus on their family's reactions, their personal experiences, relationships, emotions, and school atmosphere. Be prepared to share this with the class.
2. Use the interview to write a paper about this topic. The topic should be two pages long, double spaced using Times New Roman, 12-point font.
3. Find an additional leader of the Civil Rights Movement and do additional research on the life of that individual.

Adapted for High School from:
United States History II
source: courses.lumenlearning.com
Desegregation and Integration
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Until 1954, racial segregation in education was not only legal but was required in seventeen states and permissible in several others. Utilizing evidence from the sociological research of Kenneth Clark and Gunnar Myrdal, however, **Thurgood Marshall**, then chief counsel for the NAACP, successfully argued the landmark case ***Brown v. Board of Education of Topeka, Kansas*** before the Supreme Court of Chief Justice Earl Warren. Marshall showed that the practice of segregation in public schools made African American students feel inferior. Even if the facilities provided were equal in nature, the Court noted in its decision, the very fact that some students were separated from others on the basis of their race made segregation unconstitutional.

Though *Plessy v. Ferguson* had been overturned, the challenge now was to integrate schools. A year after *Brown*, the Supreme Court ordered southern school systems to begin desegregation “with all deliberate speed.” Some school districts voluntarily integrated their schools. For many other districts, however, “deliberate speed” proved to be very slow.



In 1957, US soldiers from the 101st Airborne were called in to escort the Little Rock Nine into and around formerly all-white Central High School in Little Rock, Arkansas.

It soon became clear that enforcing *Brown v. Board of Education* would require presidential intervention. Eisenhower did not agree with the Supreme Court’s decision and did not wish to force southern states to integrate their schools. However, as president he was responsible for doing so. In 1957,

Central High School in Little Rock, Arkansas, was forced to accept its first nine African American students, who became known as the **Little Rock Nine**. In response, Arkansas governor Orval Faubus called out the state National Guard to prevent the students from attending classes, removing the troops only after Eisenhower told him to do so. A subsequent attempt by the nine students to attend school resulted in mob violence. Eisenhower then placed the Arkansas National Guard under federal control and sent the US Army’s 101st Airborne Division to escort the students to and from school as well as from class to class. This was the first time since the end of Reconstruction that federal troops were required to protect the rights of African Americans in the South.

Throughout the school year, the Little Rock Nine were insulted, harassed, and physically assaulted; nevertheless, they returned to school each day. At the end of the year, the first African American student graduated from Central High. At the beginning of the 1958–1959 school year, Faubus ordered all Little Rock public schools closed. In the opinion of White segregationists, keeping all students out of school was preferable to having them attend integrated schools. In 1959, the Supreme Court ruled that the school had to be reopened and that the process of desegregation had to proceed.

White Responses

Efforts to desegregate public schools led to a backlash among many southern Whites, who greeted the *Brown* decision with horror. Some World War II veterans questioned how the government they had fought for could betray them in such a fashion. Some White parents promptly withdrew their children from public schools and enrolled them in exclusively White private academies, many of which had been newly created for the sole purpose of keeping White children from attending integrated schools. Often, these “academies” held classes in neighbors’ basements or living rooms.

Other White southerners turned to state legislatures or courts to solve the problem of school integration. Orders to integrate school districts were routinely challenged in court. When the lawsuits

proved unsuccessful, many southern school districts responded by closing all public schools, as governor Faubus had done after Central High School was integrated. One county in Virginia closed its public schools for five years rather than see them integrated. Besides suing school districts, many southern segregationists filed lawsuits against the NAACP, trying to bankrupt the organization. Many national politicians supported the segregationist efforts. In 1956, ninety-six members of Congress signed “The Southern Manifesto,” in which they accused the Supreme Court of misusing its power and violating the principle of **states’ rights**, which maintained that states had rights equal to those of the federal government.

Emmett Till

Unfortunately, many White southern racists, frightened by challenges to the social order, responded with violence. When Little Rock’s Central High School desegregated, an irate Ku Klux Klansman from a neighboring community sent a letter to the members of the city’s school board in which he denounced them as communists and threatened to kill them. White rage sometimes erupted into murder.

In the summer of 1955, two White men in Mississippi kidnapped and brutally murdered fourteen-year-old **Emmett Till**. Till, visiting from Chicago and perhaps unfamiliar with the “etiquette” of Jim Crow, allegedly whistled at a White woman named Carolyn Bryant. Her husband, Roy Bryant, and another man, J. W. Milam, abducted Till from his relatives’ home, beat him, mutilated him, shot him, and threw his body in the Tallahatchie River. Emmett’s mother, Mamie, held an open-casket funeral so that Till’s disfigured body could be shown in national news coverage. The men were brought to trial. Though the evidence was damning, an exclusively White jury found the two men not guilty. Mere months after the decision, they boasted of their crime, in all of its brutal detail, in *Look* magazine. “They ain’t gonna go to school with my kids,” Milam said. They wanted “to make an example of [Till]—just so everybody can know how me and my folks stand.”

At the trial, Mamie Till delivered emotional testimony, but the all-white jury set the men free. White juries rarely enforced the rule of law in the segregated South, and Whites accused of heinous crimes were usually acquitted. So Till’s killers confessed to the crime but were never punished, and *Look* magazine paid them for their story. Television,

too, was increasingly making Northern Whites more aware of the gross injustices suffered by African Americans in the South, such as the violence in Birmingham a few years later.

Because of Mamie Till’s determined efforts, the lynching and trial drew unprecedented national and world outrage over the murder of an African American, soiling America’s image in the Cold War against Communism, especially in developing nations. It washed out the optimism Black Americans had felt a year earlier when the Supreme Court’s Brown decision outlawed segregated schools. During the fall of 1955, several hundred thousand joined rallies protesting Till’s murder in Chicago and other large cities. The growing coalition of churches, labor unions, and Black organizations that marched helped launch the emerging civil rights movement, in conjunction with the simultaneous **Montgomery Bus Boycott**. Indeed, **Rosa Parks** was among those moved by Till’s murder, and in the early 1960s, the lunch-counter protesters and freedom riders called themselves the “Emmett Till generation.”

The Montgomery Bus Boycott

One of those inspired by Till’s death was Rosa Parks, an NAACP member from Montgomery, Alabama, who became the face of the 1955-1956 Montgomery Bus Boycott. City ordinances segregated the city’s buses, forcing African American passengers to ride in the back section. They had to enter through the rear of the bus, could not share seats with White passengers, and if the front of the bus was full and a White passenger requested an African American’s seat, were required to relinquish their place. The bus company also refused to hire African American drivers even though most of the people who rode the buses were Black.

On December 1, 1955, Rosa Parks refused to give her seat to a White man, and the Montgomery police arrested her. After being bailed out of jail, she decided to fight the laws requiring segregation in court. To support her, the Women’s Political Council, a group of African American female activists, organized a boycott of Montgomery’s buses. News of the boycott spread through newspaper notices and by word of mouth; ministers rallied their congregations to support the Women’s Political Council. Their efforts were successful, and forty thousand African American riders did not take the bus on December 5, the first day of the boycott.

Other African American leaders within the city embraced the boycott and maintained it beyond

December 5, Rosa Parks' court date. Among them was a young minister named **Martin Luther King, Jr.** For the next year, Black Montgomery residents avoided the city's buses. Some organized carpools. Others paid for rides in African American-owned taxis, whose drivers reduced their fees. Most walked to and from school, work, and church for 381 days, the duration of the boycott. In June 1956, an Alabama federal court found the segregation ordinance unconstitutional. The city appealed, but the Supreme Court upheld the decision. The city's buses were desegregated.

The Montgomery bus boycott made King a national civil rights leader and charismatic symbol of black equality. Other Black ministers and activists like Abernathy, Rev. Fred Shuttlesworth, Bayard Rustin, and Ella Baker also became prominent figures in the civil rights movement. The ministers formed the Southern Christian Leadership Conference (SCLC) to protest white supremacy and work for voting rights throughout the South, testifying to the importance of Black churches and ministers as a vital element of the civil rights movement.

THURGOOD MARSHALL ON FIGHTING RACISM

As a law student in 1933, Thurgood Marshall was recruited by his mentor, Charles Hamilton Houston, to assist in gathering information for the defense of a Black man in Virginia accused of killing two White women. His continued close association with Houston led Marshall to aggressively defend Black people in the courts and to use the legal system as means of securing equal rights in accordance with the Constitution. Houston also suggested that it would be important to establish legal precedents regarding the Plessy v. Ferguson ruling of separate but equal.

By 1938, Marshall had become "Mr. Civil Rights" and in 1940 formally organized the NAACP's Legal Defense and Education Fund to garner the resources necessary for challenging

entrenched race-based inequalities in the American justice system. A direct result of Marshall's energies and commitment was his 1940 victory in a Supreme Court case, Chambers v. Florida, which held that confessions obtained by violence and torture were inadmissible in a court of law. His most well-known case was Brown v. Board of Education in 1954, which held that state laws establishing separate public schools for Black and White students were unconstitutional.

Later in life, Marshall reflected on his career fighting racism in a speech at Howard Law School in 1978:

Be aware of that myth, that everything is going to be all right. Don't give in. I add that, because it seems to me, that what we need to do today is to refocus. Back in the 30s and 40s, we could go no place but to court. We knew then, the court was not the final solution. Many of us knew the final solution would have to be politics, if for no other reason, politics is cheaper than lawsuits. So now we have both. We have our legal arm, and we have our political arm. Let's use them both. And don't listen to this myth that it can be solved by either or that it has already been solved. Take it from me, it has not been solved.



In 1956, NAACP leaders (from left to right) Henry L. Moon, Roy Wilkins, Herbert Hill, and Thurgood Marshall present a new poster in the campaign against southern white racism. Marshall successfully argued the landmark case *Brown v. Board of Education* (1954) before the US Supreme Court and later became the court's first African American justice.

Lesson Two

History Overview and Assignments Leaders Emerge in the Civil Rights Movement



Hundreds of thousands descended on Washington, DC's Lincoln Memorial Aug. 28, 1963. It was from the steps of the memorial that King delivered his famous *I Have a Dream* speech. King's many speeches and nonviolent actions were instrumental in shaping the nation's outlook on equality.

Key People, Places, and Events

John F. Kennedy
Martin Luther King Jr.
Civil Rights Act of 1960
Lyndon B. Johnson
1964 Civil Rights Act

Discussion Questions

1. What did the Civil Rights Act of 1960 accomplish?
2. What did the Civil Rights Act of 1964 accomplish?
3. Who was ultimately responsible for both of these acts passing into law?

Suggested Reading and Assignments

- Review the discussion questions read the article: *Kennedy, Johnson, and the Civil Rights Movement*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

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United States History II

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Kennedy, Johnson, and the Civil Rights Movement

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Cold War concerns, which guided US policy in Cuba and Vietnam, also motivated the Kennedy administration's steps toward racial equality. Realizing that legal segregation and widespread discrimination hurt the country's chances of gaining allies in Africa, Asia, and Latin America, the federal government increased efforts to secure the civil rights of African Americans in the 1960s. During his presidential campaign, **John F. Kennedy** intimated his support for civil rights and worked to secure the release of civil rights leader **Martin Luther King, Jr.**, who was arrested following a demonstration. These actions motivated many African American voters to support Kennedy.

However, lacking widespread backing in Congress and anxious not to offend White southerners, Kennedy was cautious in assisting African Americans in their fight for full citizenship rights.

His strongest focus was on securing the voting rights of African Americans. Kennedy feared the loss of support from southern White Democrats and the impact a struggle over civil rights could have on his foreign policy agenda as well as on his reelection in 1964. Still, he thought voter registration drives far preferable to the boycotts, sit-ins, and integration marches that had generated such intense global media coverage in previous years.

In 1960, Congress passed the **Civil Rights Act**

of 1960, which permitted federal courts to appoint referees to guarantee that qualified persons would be registered to vote. Encouraged by the new legislation, Kennedy focused on the passage of a constitutional amendment outlawing poll taxes, a tactic that southern states used to disenfranchise African American voters. Originally proposed by President Truman's Committee on Civil Rights, the idea was largely forgotten during Eisenhower's time in office. Kennedy, however, revived it and convinced Spessard Holland, a conservative Florida senator, to introduce the proposed amendment in Congress. It passed both houses of Congress and was sent to the states for ratification in September 1962.

Kennedy also reacted to the demands of the civil rights movement for equality in education. For example, when African American student James Meredith, encouraged by Kennedy's speeches, attempted to enroll at the segregated University of Mississippi in 1962, riots broke out on campus. On an evening known infamously as the Battle of Ole Miss, segregationists clashed with troops in the middle of campus, resulting in two deaths and hundreds of injuries. The president responded by sending the US Army and National Guard to Oxford, Mississippi, to support the US Marshals that his brother Robert, the attorney general, had dispatched.

Following similar violence at the University of Alabama when two African American students, Vivian Malone and James Hood, attempted to enroll in 1963, Kennedy responded with a bill that would give the federal government greater power to enforce school desegregation, prohibit segregation in public accommodations, and outlaw discrimination in employment. Kennedy did not live to see his bill enacted, but **Lyndon B. Johnson** ensured the passage of the **1964 Civil Rights Act** in the first year of his presidency.



Escorted by a US marshal and the assistant attorney general for civil rights, James Meredith (center) enters the University of Mississippi over the riotous protests of white southerners. Meredith later attempted a "March against Fear" in 1966 to protest the inability of southern African Americans to vote. His walk ended when a passing motorist shot and wounded him. (credit: Library of Congress)

Lesson Three

History Overview and Assignments Civil Rights Momentum



Many businesses, such as those in this neighborhood at the intersection of 7th and N Streets in NW, Washington, DC, were destroyed in riots that followed the assassination of Martin Luther King, Jr.

Suggested Reading and Assignments

- Review the discussion questions and vocabulary, then read two articles: *The Civil Rights Movement Gains Momentum* and *Black Frustration and Black Power*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

sit-in	John Lewis	Martin Luther King, Jr.	Black separatism
Freedom Rides	Ku Klux Klan	Malcolm X	

Discussion Questions

1. What are the similarities and differences between Martin Luther King, Jr. and Malcolm X? Which do you most agree with and why?
2. Do some extended research on the later life of John Lewis and be prepared to share it with the class?
3. What current Republican Senator called John Lewis his mentor? (Research this online.)

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United States History II

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The Civil Rights Movement Gains Momentum

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Though the federal government increased its efforts to protect civil rights and ensure equal economic and educational opportunities for all, the credit for progress toward racial equality in the United States mainly lies with grassroots activists. Indeed, it was campaigns and demonstrations by ordinary people that spurred the federal government to action. We learned that major legislation mandating greater equality was passed under the Kennedy and Johnson administrations, but there were major social movements underway that led to those new policies. Let's backtrack for a moment and review some of this impactful activism of the 60s.

Change From the Bottom Up

So much of the energy and character of the sixties emerged from the civil rights movement, which won its greatest victories in the early years of the decade. The movement itself was changing. Many of the civil rights activists pushing for school desegregation in the 1950s were middle-class and middle-aged. In the 1960s, a new student movement arose whose members wanted swifter changes in the segregated South. Confrontational protests, marches, boycotts, and **sit-ins** accelerated.

The Sit-In Movement

On February 1, 1960, four sophomores at the

North Carolina Agricultural & Technical College in Greensboro—Ezell Blair, Jr., Joseph McNeil, David Richmond, and Franklin McCain—entered the local Woolworth's and sat at the lunch counter. The lunch counter was segregated, and they were refused service as they knew they would be. They specifically chose Woolworth's because it was a national chain and was thus believed to be especially vulnerable to negative publicity.

Over the next few days, more protesters joined the four sophomores. Hostile White customers responded with threats and taunted the students by pouring sugar and ketchup on their heads. But the defiant sit-in was successful; Woolworth's department stores desegregated. The protests also offered evidence that student-led direct action could enact social change and establish the civil rights movement's direction in the forthcoming years. Within two months, the sit-in movement spread to fifty-four cities in nine states.

In the words of grassroots civil rights activist Ella Baker, the students at Woolworth's wanted more than a hamburger; the movement they helped launch was about empowerment. Baker pushed for a "participatory democracy" that built on the grassroots campaigns of active citizens instead of deferring to the leadership of educated elites and experts.

As a result of her actions, in April 1960, the Student Nonviolent Coordinating Committee (SNCC) formed to carry the movement forward. Within a year, more than one hundred cities had desegregated at least some public accommodations in response to student-led demonstrations. The sit-ins inspired other forms of nonviolent protest intended to desegregate public spaces. “Sleep-ins” occupied motel lobbies, “read-ins” filled public libraries, and churches became the sites of “pray-ins.”

Freedom Rides

Students also took part in the 1961 “**freedom rides**” sponsored by the Congress of Racial Equality (CORE) and SNCC. Activists organized interstate bus rides following a Supreme Court decision outlawing segregation on public buses and trains. The rides intended to test the court’s ruling, which many southern states had ignored, and to protest segregated waiting rooms in southern terminals. Departing Washington, DC, on May 4, the volunteers headed south on buses that challenged the seating

order of Jim Crow segregation. White people would ride in the back, Black people would sit in the front; on other occasions, riders of different races would share the same bench seat.

The freedom riders encountered little difficulty until they reached Rock Hill, South Carolina, where a mob severely beat **John Lewis**, a freedom rider who later became chairman of SNCC. The danger increased as the riders continued through Georgia into Alabama, where one of the two buses was firebombed outside the town of Anniston. The second group continued to Birmingham, where **Ku Klux Klan** members attacked riders as they attempted to disembark at the city bus station. The remaining volunteers continued to Mississippi, where police arrested them when they attempted to desegregate the waiting rooms in the Jackson bus terminal. Despite the ongoing resistance to their work, the Freedom Riders’ persistence paid off. In November 1961, the Interstate Commerce Commission began enforcing integrated interstate buses and trains.

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Black Frustration and Black Power

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The vision of White and African American people working together peacefully to end racial injustice suffered a severe blow with the death of Martin Luther King, Jr. in Memphis, Tennessee, in April 1968. King had gone there to support sanitation workers trying to unionize. On April 4, King was shot and killed while standing on the balcony of his motel.

Within hours, the nation’s cities exploded with violence as angry African American people, shocked by his murder, burned and looted inner-city neighborhoods across the country. White people recoiled from news about the riots in fear and dismay. They also criticized Black people for destroying their own neighborhoods, not realizing that most of the violence was directed against businesses that were not owned by Black people and that treated Black customers with suspicion and hostility.

Black Frustration

The episodes of violence that accompanied

Martin Luther King, Jr.’s murder were the latest in a string of urban riots began in the mid-1960s. Between 1964 and 1968, there were 329 riots in 257 cities across the nation, including the riots in Watts, an African American neighborhood in Los Angeles. Thousands of businesses were destroyed and, by the time the violence ended, thirty-four people were dead, most of them African Americans killed by the Los Angeles police and the National Guard. More riots took place during the teeming, hot summers of 1966 and 1967.

Frustration and anger lay at the heart of these disruptions. Despite the programs of Johnson’s Great Society (which implemented programs to help alleviate poverty in America), good healthcare, job opportunities, and safe housing were abysmally lacking in urban African American neighborhoods in cities throughout the country, including in the North and West, where discrimination was less overt but just as crippling. In the eyes of many rioters, the federal government either could not or would not end their suffering, and most existing civil rights

groups and their leaders had been unable to achieve significant results toward racial justice and equality. Disillusioned, many African Americans turned to those with more radical ideas about how best to obtain equality and justice.

Malcolm X

Many embraced the more militant message of the burgeoning Black Power Movement as a result of **Malcolm X's** compelling expressions of Black pride. Malcolm X was a minister in the Nation of Islam, a Muslim religious organization and Black nationalist group that promoted Black economic independence, affirmed the use of self-defense against White violence, and sought the end of White supremacy. In a radical departure from Martin Luther King, Jr.'s emphasis on nonviolence, Malcolm X advocated armed resistance in defense of the safety and well-being of Black Americans, stating, "I don't call it violence when it's self-defense, I call it intelligence." Malcolm X therefore encouraged African Americans to pursue freedom, equality, and justice by "any means necessary."

Prior to his death in 1965, Malcolm X and the NOI emerged as the radical alternative to the racially integrated, largely Protestant approach of Martin Luther King, Jr. For much of his life, Malcolm X advocated for **Black separatism**, a Black power philosophy that rejected the pursuit of racial integration and argued Black communities could best solve their own problems if they remained separate from White society.

Malcolm X's views regarding Black-White relations shifted after his trip to Mecca in 1964; he returned from the Hajj more open to interracial pursuit of social justice. Still, he remained fiercely committed to the cause of Black empowerment. On his return to the US, he left the Nation of Islam to found the Organization of Afro-American Unity (OOAU), which emphasized the common cause of African nations and African Americans while advocating for Black education, empowerment, and self-determination on a global scale. The OOAU dissipated following Malcolm X's assassination by members of the Nation of Islam on February 21, 1965.

Stokely Carmichael

Malcolm X's organization may have disbanded, but his words and ideas continued to thrive in the Black Power movement. Later Black Power leaders, including Stokely Carmichael and leaders of the

Black Panther Party, credited Malcolm X with providing an intellectual basis for Black Nationalism and legitimizing violence as a strategy to achieve the goals of Black Power.



Stokely Carmichael (a), one of the most famous and outspoken advocates of Black Power, is surrounded by members of the media after speaking at Michigan State University in 1967. Malcolm X (b) was raised in a family influenced by Marcus Garvey and persecuted for its outspoken support of civil rights. While serving a stint in prison for armed robbery, he was introduced to and committed himself to the Nation of Islam. (credit b: modification of work by Library of Congress)

Malcolm X's perspective became increasingly appealing following President Johnson's refusal to take up the cause of the Black delegates in the Mississippi Freedom Democratic Party at the 1964 Democratic National Convention. SNCC activists became frustrated with institutional tactics and turned away from the organization's founding principle of nonviolence and pursuit of integration. In the late 1960s, Stokely Carmichael, influenced by the ideology of Black separatism, expelled SNCC's White members and rejected interracial efforts in the rural South.

Carmichael's actions were representative of an evolving movement that called for Black Americans to play a dominant role in cultivating Black institutions and articulating Black interests rather than relying on interracial, moderate approaches. At a June 1966 civil rights march, Carmichael debuted an alternate understanding of freedom for Black Americans. Frustrated by the endurance of discrimination, he told the crowd, "We been saying freedom for six years and we ain't got nothin.' What we gonna start saying now is Black power!" The slogan not only resonated with audiences, it also stood in direct contrast to King's "Freedom Now!" campaign.

The Artios Home Companion Series

Unit 24: The Indochina Wars

Teacher Overview

IN 1946, A DIVISION OF VIETNAM into the communist North and pro-Western South led to the First Indochina War, in which the French were forced by the communists to surrender their colonial hold on the Southeast Asian peninsula—but then the communists wanted to take over South Vietnam as well. American promises and commitments to the people and government of South Vietnam to protect them from communist aggression led the Second Indochina War, in which the US sent forces to support the Republic of Vietnam against the North Vietnamese Army. Despite the decades of resolve, billions and billions of dollars, nearly 60,000 American lives, and many more injuries, the United States failed to achieve its objectives, and the Vietnam War ended up being the longest war in United States history.

Many difficulties plagued the war effort. The enemy was hard to identify. The war was not fought between conventional army forces of two separate nations. The Viet Cong (pro-communist South Korean guerrillas) blended in with the local population and struck by ambush, often at night. North Vietnam and the Viet Cong were supplied by both China and the Soviet Union, with many supply lines running through neighboring, supposedly neutral countries. Massive American bombing campaigns hit their targets but failed to make the North Vietnamese concede. Promises made by American military and political leaders that the war would soon be over were not fulfilled.

And night after night, Americans turned on the news to see the bodies of their young flown home in bags, as the Vietnam War was the first televised war. Draft injustices such as college deferments surfaced, harkening back to similar controversies during the Civil War. The average age of the American soldier in Vietnam was nineteen. As the months of the war became years, the public became impatient. Only a small percentage of Americans believed their government was evil or sympathized with the Viet Cong. But many began to feel it was time to cut losses.

President Nixon signed a ceasefire in January 1973 that formally ended the hostilities. In 1975, communist forces from the North overran the South and unified the nation. Neighboring Cambodia and Laos also became communist dictatorships. At home, returning Vietnam veterans found readjustment and even acceptance difficult. The scars of Vietnam would not heal quickly for the United States. The legacy of bitterness divided the American citizenry and has influenced foreign policy into the 21st century.



The Ho Chi Minh supply trail for the Viet Cong required, on average, four months of rough-terrain travel for combatants from North Vietnam destined for the Southern battlefields.

Suggested Assignments

In this unit, students will:

- Complete six lessons in which they will learn about the **Cold War conflicts in Indochina**, focusing on the **Vietnam War**, journaling, and answering discussion questions as they read.
- Define vocabulary words.
- Instead of using discussion questions, this unit will focus on note-taking skills in an outline format. Directions are given in each lesson
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

God’s Word tells us there will be times for both war and peace.

A time to love, and a time to hate; a time for war, and a time for peace.

– Ecclesiastes 3:8

“The only thing necessary for the triumph of evil is for good men to do nothing.” – Edmund Burke

When the righteous increase, the people rejoice: but when the wicked rule, the people groan.

– Proverbs 29:2

Before God, all men and women are created equal.

There is neither Jew nor Gentile, neither slave nor free, nor is there male and female, for you are all one in Christ Jesus.

– Galatians 3:28 (review)

Lesson One

History Overview and Assignments France and Indochina

AFTER DECADES OF SERVING as France’s colony of economic exploitation, Indochina fell under Japanese control during World War II. Although the French regained control of the region after the war, independence movements across Indochina grew strong enough to continue their anti-French struggle. The countries of this region include Vietnam, Laos, and Cambodia.



French Indochina (1913)

Key People, Places, and Events

Indochina
Vietnam
Cambodia
Laos
Saigon
Hanoi
Ho Chi Minh
Viet Minh
Dong Minh Hoi
Office of Strategic Services (OSS)
Bao Dai
Democratic Republic of Vietnam (DRV)
August Revolution

Vocabulary

autonomy
acquiesce
continuity

Suggested Reading and Assignments

- Review the vocabulary, then read the online article: *Indochina—France and Indochina*. The URL can be found on your **ArtiosHCS** curriculum website. *Note: Read through the end of the section “After World War II.”*
- Instead of answering discussion questions, for each heading in today’s reading create an outline showing the main points made by the author. Use the website found on your **ArtiosHCS** curriculum website to explore the use of outlines.
- Narrate about today’s reading using the appropriate notebook page. Be sure to include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Lesson Two

History Overview and Assignments Independence in Indochina

THE DIVISION OF VIETNAM into the communist North and pro-Western South led to the First Indochina War, but this expansion of communism stirred great concern among Western powers. Viet Minh forces fought against the French Union from 1945 until the Geneva Conference of 1954 that forced France to abandon all claims to the colonies of Indochina, including Laos and Cambodia.



Captured French soldiers, escorted by Vietnamese troops, walk to a prisoner-of-war camp in Dien Bien Phu.

Suggested Reading and Assignments

- Review the vocabulary, then read the online article: *Indochina—Independence in Indochina*. The URL can be found on your **ArtiosHCS** curriculum website. *Note: Read the sections “From Independence in Indochina” through “Cambodia’s Independence.”*
- For each heading in today’s reading, create an outline showing the main points made by the author. Use the website found on **ArtiosHCS** curriculum website to explore the use of outlines.
- Narrate about today’s reading using the appropriate notebook page. Be sure to include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

First Indochina War
Battle of Dien Bien Phu
Ngo Dinh Diem
Second Indochina (Vietnam) War
Phnom Penh

Vocabulary

ostensible
insurgency
guerilla warfare
impingement



French Foreign Legion patrol question a suspected member of the Viet Minh.

Lesson Three

History Overview and Assignments The Geneva Agreements

THE 1954 GENEVA CONFERENCE produced an agreement between the French and Viet Minh military commands (but not the pro-Western State of Vietnam) that divided Vietnam along the 17th Parallel, escalating tensions between the North and the South and leading to the Second Indochina War (Vietnam War). The US made the decision to intervene in support of South Vietnam to repel communist North Vietnamese aggression.



The 1954 Geneva Conference

Key People, Places, and Events

Geneva Conference
Geneva Accords
Pham Van Dong
Agreement on the Cessation of Hostilities
in Vietnam
International Control Commission (ICC)

Vocabulary

plenary session
enclave

Suggested Reading and Assignments

- Review the vocabulary, then read the online article: *Indochina—The Geneva Agreements*. The URL can be found on your **ArtiosHCS** curriculum website. *Note: Read the sections “The Geneva Agreements” through “Outcomes.”*
- For each heading in today’s reading, create an outline showing the main points made by the author. Use the website found on **ArtiosHCS** curriculum website to explore the use of outlines.
- Narrate about today’s reading using the appropriate notebook page. Be sure to include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Lesson Four

History Overview and Assignments The Vietnam War

THE 20-YEAR-LONG VIETNAM WAR between the communist North and pro-Western South backed by the United States has had tragic consequences for the entire region, including the victory of communists in Vietnam, the rise of the Khmer Rouge (followers of the Communist Party of Kampuchea) to power in Cambodia, a massive refugee crisis, and the lasting impact that the use of chemicals by the US military had on the region's population.

“On August 2, 1964, gunboats of North Vietnam allegedly fired on ships of the United States Navy stationed in the Gulf of Tonkin. They had been sailing 10 miles off the coast of North Vietnam in support of the South Vietnamese navy. When reports that further firing occurred on August 4, President Johnson quickly asked Congress to respond. With nearly unanimous consent, members of the Senate and House empowered Johnson to ‘take all necessary measures’ to repel North Vietnamese aggression. The Tonkin Gulf Resolution gave the President a ‘blank check’ to wage the war in Vietnam as he saw fit. After Lyndon Johnson was elected President in his own right that November, he chose to escalate the conflict. In February 1965, the United States began a long program of sustained bombing of North Vietnamese targets known as Operation Rolling Thunder. At first only military targets were hit, but as months turned into years, civilian targets were pummeled as well.”

– USHistory.org



Viet Cong fighters crossing a river

George Esper, *The Eyewitness History of the Vietnam War, 1961-1975*



A Marine gets his wounds treated during operations in Huế City, in 1968.

Sergeant William F. Dickman, photographer

Suggested Reading and Assignments

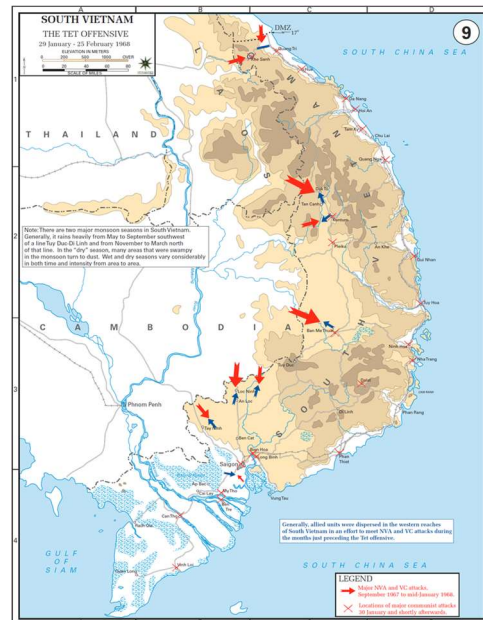
- Review the vocabulary, then read the online article: *Indochina—The Vietnam War at*. The URL can be found on your **ArtiosHCS** curriculum website. *Note: Read the sections “The Vietnam War” through “Aftermath in Southeast Asia.”*
- For each heading in today’s reading, create an outline showing the main points made by the author. Use the website found on **ArtiosHCS** curriculum website to explore the use of outlines.
- Narrate about today’s reading using the appropriate notebook page. Be sure to include key people, events, and dates within the narration.
- Define the vocabulary words in the context of the reading. Write the words and their definitions in the vocabulary section of your history notebook.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

Republic of Vietnam (ROV)
National Liberation Front (Viet Cong)
MAAG Vietnam
Vietnam People's Army (VPA)
Nixon Doctrine
Vietnamization
Khmer Rouge
Easter Offensive of 1972
Paris Peace Accords
Socialist Republic of Vietnam
Pol Pot
Cambodian-Vietnamese War
Sino-Vietnamese War
Lao People's Democratic Republic (Laos)
Indochina refugee crisis
Agent Orange

Vocabulary

rapprochement
fiasco
defoliant



Map of the 1968 Tet Offensive, one of the largest campaigns during the Vietnam War, in which the North Vietnamese forces launched surprise attacks against the American forces and their allies. The campaign began on Tet, the Buddhist holiday that celebrates the Vietnamese Lunar New Year.

Lesson Five

History Overview and Assignments The Khmer Rouge

THE KHMER ROUGE regime in Cambodia (1975-1979) introduced an extreme governing system based on the relocation of urban residents to rural areas and halting nearly all economic, social, and cultural activities. It was responsible for mass atrocities known as the Cambodian genocide.



Photos of the victims of the Khmer Rouge

Taken in the Tuol Sleng Museum with permission from the Museum administration on March 13, 2006. Donated to the Wikipedia system by Albeiro Rodas, Cambodia (July 2006)

Key People, Places, and Events

Khmer Rouge
Vietnam Workers' Party
Lao Issara
Pol Pot
Sihanouk
Communist Party of
Kampuchea (CPK)
People's Republic of
Kampuchea
Hun Sen
S-21

Suggested Reading and Assignments

- Read the online article: *Indochina—The Vietnam War at*. The URL can be found on your **ArtiosHCS** curriculum website. *Note: Read the sections “Cambodia and the Khmer Rouge” to the end of the webpage.*
- For each heading in today’s reading, create an outline showing the main points made by the author. Use the website found on **ArtiosHCS** curriculum website to explore the use of outlines.
- Narrate about today’s reading using the appropriate notebook page. Be sure to include key people, events, and dates within the narration.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Lesson Six

History Overview and Assignments The Anti-war Movement

WHEN THE WAR in Vietnam began, many Americans believed that defending South Vietnam from communist aggression was in the national interest. Communism was threatening free governments across the globe. Any sign of non-intervention from the United States might encourage revolutions elsewhere. But as the war dragged on, more and more Americans grew weary of mounting casualties and escalating costs. The small antiwar movement grew into an unstoppable force, pressuring American leaders to reconsider its commitment.



US Marshals arresting a Vietnam War protester in Washington, DC (1967)



The Vietnam War was protested in other countries as well. Here Finns protest in Helsinki.

Suggested Reading and Assignments

- Read the online article:— *The Anti-war Movement*. The URL can be found on your **ArtiosHCS** curriculum website. *Note: Read the sections “The Vietnam War” through “Aftermath in Southeast Asia.”*
- For each heading in today’s reading, create an outline showing the main points made by the author. Use the website found on **ArtiosHCS** curriculum website to explore the use of outlines.
- Narrate about today’s reading using the appropriate notebook page. Be sure to include key people, events, and dates within the narration.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

Twenty-Sixth Amendment

Tonkin Gulf Resolution

The Artios Home Companion Series

Unit 25: The Kennedy, Johnson, and Nixon Years

Teacher Overview

WHEN JOHN F. KENNEDY was elected president in 1960, the United States was at the apex of its post-war optimism. The 1950s economy raised the American standard of living to a level second to none. Although communism was a threat, the rebuilt nations of Western Europe proved to be solid Cold War allies. Lyndon Johnson pursued an ambitious domestic agenda, enacting the “Great Society” and “War on Poverty,” a collection of programs related to civil rights, economic opportunity, education, healthcare, environmental protection, and public broadcasting. Historians argue that the Great Society and War on Poverty mark the peak of liberal policy in the United States, and the culmination of the New Deal era. Richard Nixon oversaw the end of American involvement in Vietnam, which went hand-in-hand with the “Vietnamization” of the war, replacing American troops with Vietnamese troops.

The 1960s were a decade of hope, change, and war that witnessed significant shifts in American culture. Despite social justice progress on many fronts, the assassinations of John F. Kennedy, Dr. Martin Luther King, Jr., and Robert Kennedy made it dramatically clear that not all Americans shared this vision of a more inclusive democracy. The 1970s were marked by the continuation of the Cold War and its proxy wars around the world, as well as a rise in both conservatism and liberal social movements at home. In what became known as the Watergate scandal, 25 of Nixon’s aides were indicted for criminal activity, and Nixon himself became the first president impeached since Andrew Johnson, and the first to resign from office.

While all this was taking place in the US, major events were brewing around the world, such as an African nationalist movement developing in the Belgian Congo, Rhodesia declaring independence from the UK, and the establishment of apartheid in South Africa, and turmoil in the Middle East.



Kennedy signs the Proclamation for Interdiction of the Delivery of Offensive Weapons to Cuba in the Oval Office.

Robert L. Knudsen. White House Photographs

Leading Ideas

God’s Word tells us there will be times for both war and peace.

A time to love, and a time to hate; a time for war, and a time for peace.

– Ecclesiastes 3:8

“The only thing necessary for the triumph of evil is for good men to do nothing.” – Edmund Burke

When the righteous increase, the people rejoice: but when the wicked rule, the people groan.

– Proverbs 29:2

Before God, all men and women are created equal.

There is neither Jew nor Gentile, neither slave nor free, nor is there male and female, for you are all one in Christ Jesus.

– Galatians 3:28 (review)

Suggested Assignments

In this unit, students will:

- Complete eight lessons in which they will learn about the **eventful Kennedy, Johnson, and Nixon years in the US and around the world**, journaling and answering discussion questions as they read.
- Select five quotes by President **John F. Kennedy** and put the quotes they select, and their insights and opinions into the relevancy of each quote in today's society, into their notebook, and be prepared to share them.
- Watch JFK's inaugural address at the link found on their **ArtiosHCS** curriculum website.
- Watch a video summary of the Cuban Missile Crisis at the link found on their **ArtiosHCS** curriculum website.
- Watch Walter Cronkite's announcement of the JFK assassination the link found on their **ArtiosHCS** curriculum website.
- Write an essay discussing the history of **court cases related to *Roe v. Wade***.
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Lesson One

History Overview and Assignments The 1960 Election

THE 1960 ELECTION was a close race. The incumbent president, Republican Dwight D. Eisenhower, had already served two terms and thus was not eligible to run again. His party nominated Richard Nixon, Eisenhower's vice president, while the Democrats nominated John F. Kennedy, a senator from Massachusetts. Kennedy defeated Nixon in the closest electoral college vote since 1916.



John F. Kennedy's campaign button
Allied Printing Trades Council Pictorial Productions - Cornell
University Library



The combination of New Englander John F. Kennedy and Texan Lyndon B. Johnson created what some called a "Boston-Austin connection" that helped balance the 1960 Democratic ticket geographically.

Suggested Reading and Assignments

- Review the discussion questions then read the online article: *The Election of 1960*. The URL for the article can be found on your **ArtiosHCS** curriculum website.

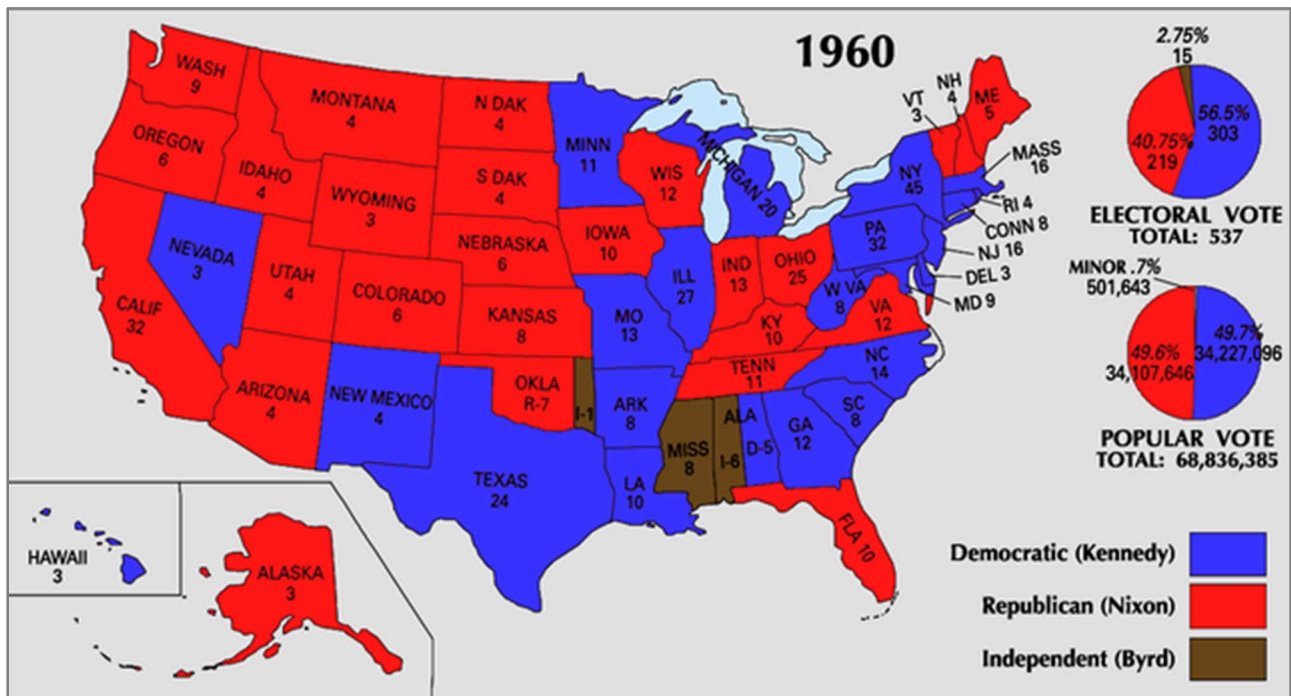
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Watch JFK's inaugural address at the URL found on your **ArtiosHCS** curriculum website.
- During the lessons in this unit, **select five quotes by President John F. Kennedy** and record them in your notebook with your insight and opinions into the relevance of each quote in *today's* society. Be prepared to share them. A list of JFK's quotes can be found at the URL on your **ArtiosHCS** curriculum website.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

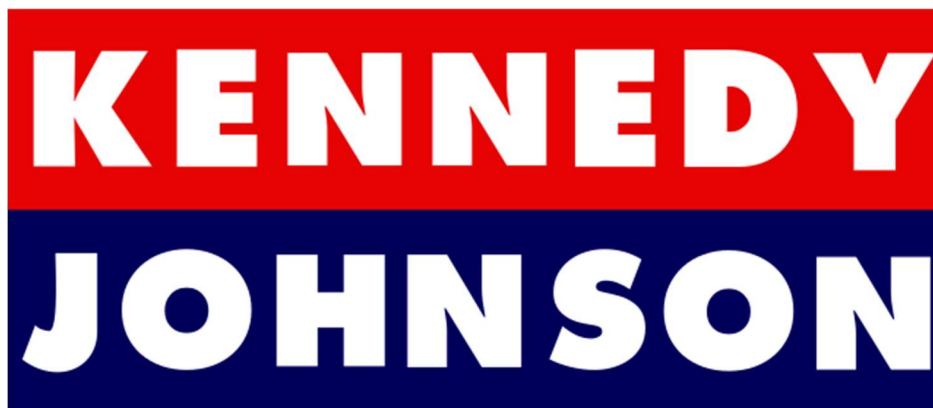
Richard M. Nixon
John F. Kennedy

Discussion Questions

1. What were some of the challenges Kennedy faced during the 1960 election?
2. What were some of the challenges Nixon faced in this election?
3. How did Kennedy overcome his challenges?
4. How did Nixon try to overcome his challenges?
5. What were the effects of television on the results of this event?
6. What were the results of the 1960 election?



1960 Electoral College Map



Kennedy Johnson 1960 campaign logo

Lesson Two

History Overview and Assignments “The Torch Has Been Passed”

PROCLAIMING THAT the “torch has been passed to a new generation of Americans,” John F. Kennedy, young and good-looking, boldly and proudly assumed office. The nation was united, positive, and forward-looking. No frontier was too distant. Kennedy’s presidency is known for his New Frontier policies, containment policy toward the Soviet Union, support for civil rights, and expansion of the space program. To counter Soviet influence in the developing world, Kennedy supported a variety of measures in Latin America, the Middle East, and Africa. The 1962 Cuban Missile Crisis, a 13-day confrontation between the Soviet Union and the United States, brought the world close to nuclear war. Kennedy increased US involvement in Vietnam between 1961 and 1963. Then in November of 1963, President John F. Kennedy was assassinated by Lee Harvey Oswald, while traveling in a presidential motorcade in Dallas.

“In 1961, the citizens of West Berlin felt completely isolated when the Soviet Union built the Berlin Wall around the city. Kennedy did not respond with force but visited West Berlin in the summer of 1963. In an attempt to show solidarity between West Berlin and the United States, he ended his rousing speech with the infamous words: ‘Ich bin ein Berliner.’ In essence, Kennedy was saying, ‘I am a citizen of West Berlin.’ The visit and the speech endeared him to the people of West Berlin and all of Western Europe.”

– USHistory.org



Watching the America’s Cup Race. Mrs. Jacqueline Kennedy, President Kennedy, and others off Newport, RI, aboard the USS *Joseph P. Kennedy, Jr.* (September 15, 1962)

Key People, Places, and Events

John F. Kennedy
New Frontier
Immigration and Nationality Act of 1965
Presidential Commission on the Status of Women
Equal Pay Act of 1963
Yuri Gagarin
Apollo Program
Peace Corps
Gamal Abdel Nasser
Jacqueline Kennedy
Fidel Castro
Bay of Pigs Invasion
Cuban Missile Crisis
Mutual Assured Destruction (MAD)
Nikita Khrushchev
Robert F. Kennedy
Anatoly Dobrynin
Kennedy’s assassination
Lee Harvey Oswald
Jack Ruby
Warren Commission

Suggested Reading and Assignments

- Review the discussion then read the online article: *The Kennedy Administration*. The URL for the article can be found on your **ArtiosHCS** curriculum website. *Note: Read the full webpage for this lesson.*
- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Continue to work on the **John F. Kennedy** quotation assignment as described in Lesson One.

- Watch a video summary of the **Cuban Missile Crisis** found at the URL on your **ArtiosHCS** curriculum website.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. During his inauguration speech, Kennedy said: “*Ask not what your country can do for you—ask what you can do for your country.*” What did Kennedy mean?
2. What confrontations dominated Kennedy’s foreign policy?
3. Describe Kennedy’s New Frontier domestic program.
4. What advances did Kennedy make in the area of civil rights?
5. What arguments did Kennedy and Johnson put forth in support of the space program?
6. What diplomatic goal did Kennedy have for the Peace Corps?
7. Describe the Cuban Missile Crisis and assess its chilling significance.
8. Trace the background behind Kennedy’s reasoning for supplying Ngo Dinh Diem with support to prop up his government.
9. On what assumption did Kennedy’s policy toward South Vietnam rest?
10. What mysteries continue to surround Kennedy’s assassination?



November 22, 1963, was a sunny day in Dallas, Texas, and for this reason the convertible presidential limousine went through the afternoon parade with the top down. The President and his wife are seated in the back of the car, while Texas governor John Connally is seated directly in front of the President.



John F. Kennedy’s stirring address to the people of West Berlin in 1963 illustrated that the US was committed to working for freedom throughout the region and the world.

Lesson Three

History Overview and Assignments The Lyndon B. Johnson Administration

FOLLOWING KENNEDY'S ASSASSINATION in 1963, Lyndon B. Johnson acceded to office and served as president from 1963 to 1969. Johnson's Great Society programs addressed education, racial injustice, poverty, the environment, and health care, among other issues. This era has been described as the peak of liberalism in the United States. Committed to preventing the expansion of communism, Johnson increased US involvement in the war in Vietnam. In 1964, he won the presidential election with 61% of the popular vote.

The Civil Rights Act of 1964 was the most far-reaching civil rights act yet passed by Congress; it banned discrimination in public accommodations, aided schools in desegregation, and prohibited federal funding of programs that permitted racial segregation. The Immigration and Nationality Act removed the immigration quotas established in the National Origins Formula (in place since the 1920s), which privileged immigrants from Northern and Western Europe.

To prevent the spread of communism, the Johnson Administration supported coup d'états in Brazil and the Dominican Republic. In February of 1965, Johnson dramatically escalated the war in Vietnam with a sustained bombing campaign and the introduction of ground troops.

Protests against the war in Vietnam through large-scale demonstrations grew steadily throughout the 60s. 1968 was a year of serious upheaval in the United States, marked by the Tet Offensive in Vietnam, increasing anti-war protests, the assassinations of Dr. Martin Luther King, Jr., and Robert Kennedy, and a tumultuous election.



Photo portrait of President Lyndon B. Johnson
in the Oval Office
Arnold Newman, White House Press Office (WHPO)

Key People, Places, and Events

Lyndon B. Johnson
Johnson's "Great Society"
Elementary and Secondary Education Act
Higher Education Act
Johnson's "War on Poverty"
Economic Opportunity Act of 1964
Civil Rights Act of 1964
Equal Employment Opportunity Commission
Voting Rights Act of 1965
National Endowments for the Arts and Humanities
Civil Rights Act of 1968
Martin Luther King, Jr.'s assassination
Robert Kennedy's assassination

Suggested Reading and Assignments

- Review the discussion questions then read the online article: *The Lyndon B. Johnson Administration*. The URL for the article can be found on your **ArtiosHCS** curriculum website. *Note: Read the full webpage for this lesson.*
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Continue to work on the **John F. Kennedy** quotation assignment as described in Lesson One.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. What bill did Johnson pass immediately following Kennedy's assassination?
2. Describe the goals and measures implemented in Johnson's "Great Society."
3. Assess the continuing disagreement regarding the results of the Great Society.
4. How did Johnson's actions differ with Kennedy's with respect to Vietnam?
5. Summarize the provisions of the Civil Rights Act of 1964 and the Voting Rights Act of 1965 and assess the societal importance of these two pieces of legislation.
6. Describe the passage and results of the Immigration and Nationality Act of 1965.
7. Summarize America's involvement in Latin America during the Johnson Administration.
8. Outline the tumultuous events of 1968.

Lesson Four

History Overview and Assignments The Nixon Administration

RICHARD M. NIXON was elected president in the election of 1968, pledging to end partisan acrimony and narrowly beating the incumbent vice president, Hubert Humphrey. The Nixon Doctrine aimed to gradually strengthen South Vietnamese forces so they could defend themselves against North Vietnam without US support. Under this doctrine, the US continued to assist its allies through economic aid and military supplies, while encouraging allies' self-defense. Nixon's overtures to the communist People's Republic of China and the Soviet Union resulted in an era of detente and nuclear arms reduction.

President Nixon's 1972 visit to the People's Republic of China (PRC) marked an important turning point in US-China relations after 22 years of separation. The improved relations between the US and PRC entailed a significant shift in the Cold War balance of power, pitting China with the US against the Soviet Union. Following the announcement of his visit to China, Nixon made a visit to Moscow, where he met and engaged in intense negotiations with Leonid Brezhnev, the General Secretary of the Communist Party. Out of this summit came agreements for increased trade and two landmark arms control treaties: SALT I, the first comprehensive limitation pact signed by the two superpowers, and the Anti-Ballistic Missile Treaty, which banned the development of systems designed to intercept incoming missiles. Nixon and Brezhnev proclaimed a new era of "peaceful coexistence."

Nixon's economic policies were shaped by an economic climate of high inflation, high interest rates, and large government spending resulting from the Vietnam War and the Great Society programs of the Johnson administration. During Nixon's second term, price controls became unpopular and were seen as more dangerous than the powerful labor unions associated with the Democratic Party.

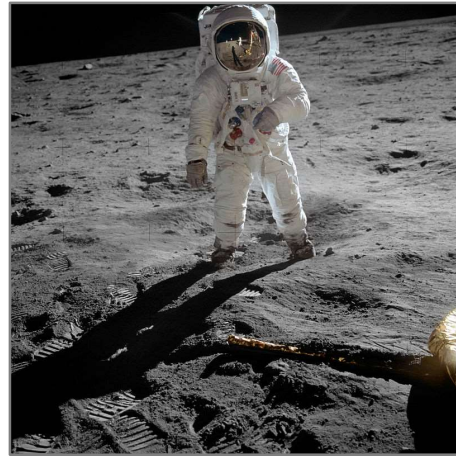
In 1972, Nixon was reelected, defeating Democratic senator George McGovern in a landslide victory. Emphasizing a stable economy and his successes in foreign affairs, Nixon won 60.7% of the popular vote, only slightly lower than Lyndon B. Johnson in 1964. However, Nixon resigned before the end of his term, on August 9, 1974, amidst a scandal that came to be known as Watergate. On June 17, Nixon was implicated in the burglary of the Democratic National Committee (DNC) headquarters at the Watergate complex, and he became the only president in American history to resign.

Suggested Reading and Assignments

- Review the discussion questions then read the online article: *The Nixon Administration*. The URL for the article can be found on your **ArtiosHCS** curriculum website. *Note: Read the full webpage for this lesson.*
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Continue to work on the **John F. Kennedy** quotation assignment as described in Lesson One.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.



Richard Nixon's presidential portrait



The Apollo 11 mission landed the first humans on the Moon in July 1969. Astronaut Edwin "Buzz" Aldrin, lunar module pilot, stands on the surface of the moon near the leg of the lunar module *Eagle* during the moonwalk. Astronaut Neil Armstrong, mission commander, took this photograph.

NASA - <http://www.hq.nasa.gov/alsj/a11/AS11-40-5903HR.jpg>
<http://www.archive.org/details/AS11-40-5903> (TIFF image) NASA Image and Video Library

Key People, Places, and Events

Richard M. Nixon
Henry Kissinger
"Vietnamization" policy
Philadelphia Plan

Leonid Brezhnev
Nixon Doctrine
Paris Peace Accords
1972 China visit

New Federalism
"Nixon Shock"
Watergate scandal

Discussion Questions

1. Summarize Nixon's domestic achievements.
2. Summarize Nixon's foreign policy achievements.
3. What were the tactical and diplomatic reasons behind Nixon's bombing campaign in Cambodia in 1969 after promising to de-escalate the war?
4. Summarize the Nixon Doctrine.
5. What took place in Chile in 1973 with American backing?
6. How was "shuttle diplomacy" employed during the Nixon Administration?
7. Summarize the reasoning and results of Nixon's 1972 visits to China and the Soviet Union.
8. Compare New Federalism to 18th century Federalism and assess Nixon's success in implementing this philosophy.
9. Trace the events of the 1972 presidential campaign and the Watergate scandal.



Oliver F. Atkins' photo of Nixon leaving the White House on Marine One shortly before his resignation became effective, August 9, 1974

Lesson Five

History Overview and Assignments Counterculture

A COUNTERCULTURE developed in the United States in the late 1960s, lasting from approximately 1964 to 1972, and coinciding with America's involvement in Vietnam. Counterculture youth rejected the cultural standards of their parents, especially with respect to racial segregation, the Vietnam War, sexual mores, women's rights, and materialism. Hippies were the largest countercultural classification and were comprised of mostly white members of the middle class. The counterculture movement divided the country. To some, it reflected American ideals of free speech, equality, and world peace; while to others, it reflected a self-indulgent and unpatriotic assault on America's moral order.

In an effort to quell the movement, government authorities banned the dangerous psychedelic drug LSD, restricted political gatherings, and tried to enforce bans on what they considered obscenity in books, music, theater, and other media. Several things brought about the decline of the movement in the early 1970s, including significant progress on the goals of the movement and rising economic troubles that forced many former hippies to rely on mainstream institutions.



A 1967 VW Kombi bus decorated with hand-painting of the hippie style
User Montrose Patriot on en.wikipedia

Key People, Places, and Events

Counterculture Movement
Woodstock Music Festival
Haight-Ashbury
Underground Press Syndicate
“Beat Generation”
Allen Ginsberg
Jack Kerouac
The Beatles

Suggested Reading and Assignments

- Review the discussion questions then read the online article: *Counterculture*. The URL for the article can be found on your **ArtiosHCS** curriculum website. *Note: Read the full webpage for this lesson.*
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Continue to work on the **John F. Kennedy** quotation assignment as described in Lesson One.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. What role did leisure time have in the development of the Counterculture Movement?
2. Evaluate the opposing opinions regarding the ideals reflected by the movement.
3. In what ways were non-conformists ironically pressured by the movement to conform?
4. What factors led to the collapse of the movement?

Lesson Six

History Overview and Assignments Roe v. Wade and Its Impact

“The fate of *Roe v. Wade* continues to lie with the Supreme Court. Although every ruling since 1973 upheld the decision, the composition of the Court changes with every retirement. Activists on each side demand a ‘litmus test’ for any justice named to the federal courts. Republicans have tended to appoint pro-life judges, and Democrats have selected pro-choice nominees. At the dawn of the 21st century, the battle remains as fierce as ever.”

– USHistory.org



Democrats for Life of America demonstrates at the 2006 March for Life.

DFLA banner at the 2006 March for Life, courtesy of Democrats for Life of America



March for Life, Jan. 24, 2020
Official White House photo by Tia Dufour

Suggested Reading and Assignments

- Read the online article: *Roe v. Wade and Its Impact*. The URL for the article can be found on your **ArtiosHCS** curriculum website. *Note: Read the full webpage for this lesson.*
- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Instead of answering discussion questions, do additional research and write an essay discussing the **history of court cases related to *Roe v. Wade***.
- Continue to work on the **John F. Kennedy** quotation assignment as described in Lesson One.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

Roe v. Wade
National Right to Life Committee
National Abortion Rights Action League

Hyde Amendment of 1976
Planned Parenthood
Planned Parenthood v. Casey

Lesson Seven

History Overview and Assignments Post-colonial Africa

AFTER WORLD WAR II, the French government began extending limited political rights in its colonies, such as including some African subjects in the governing bodies of the colonies and giving limited citizenship rights to the indigenous inhabitants. In 1960, a further revision of the French constitution allowed members of the French Community (the successor to the French colonial empire) to unilaterally change their own constitutions. This resulted in the end of French West Africa. Meanwhile, other major changes were brewing, such as an African nationalist movement developing in the Belgian Congo, Rhodesia declaring independence from the UK, and the establishment of apartheid in South Africa.



Savanna at Ngorongoro Conservation Area, Tanzania
CC BY 2.0 <https://www.flickr.com/photos/78328628@N00/44030204/>

Suggested Reading and Assignments

- Review the discussion questions then read the combined article: *Independence in the Maghreb, The Democratic Republic of the Congo, Zimbabwe, and South Africa.*
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Complete your work on the **John F. Kennedy** quotation assignment as described in Lesson One.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

French West Africa

Algerian War

Front de Libération Nationale (FLN)

Philippeville massacre

Charles de Gaulle

Morocco

Congo

Joseph-Desiré Mobutu

Zaire

Libya

Idris I

Muammar al-Gaddafi

Rhodesia

Zimbabwe

Robert Mugabe

Sharpeville Massacre

Pan-Africanist Congress (PAC)

African National Congress (ANC)

Apartheid

Republic of South Africa

Discussion Questions

1. In what year did the French West African colonial territories gain independence?
2. What happened in Philippeville in 1955?
3. List the steps by which independence was gained in Morocco, Congo, Libya, and Rhodesia.
4. Trace the history of apartheid in South Africa.

Adapted for High School from:

Boundless US and/or World History

source: courses.lumenlearning.com

Independence in the Maghreb, the Democratic Republic of the Congo, Zimbabwe, and South Africa

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Toward Independence

French West Africa was a federation of eight French colonial territories in Africa that existed from 1895 until 1960, when the colonies established independence from France. Senegal and former French Sudan became the Mali Federation (1960–61), while Côte d'Ivoire, Niger, Upper Volta (now Burkina Faso) and Dahomey (now Benin) subsequently formed the short-lived Sahel-Benin Union, later the *Conseil de l'Entente*.

Algerian Revolution

The **Algerian War**, also known as the Algerian War of Independence or the Algerian Revolution, was a war between France and the Algerian National Liberation Front (French: **Front de Libération Nationale**, or **FLN**) from 1954 to 1962 and led to Algerian independence from France. An important decolonization war, this complex conflict was characterized by guerrilla warfare and the use of torture by both sides.

An important watershed in the War of Independence was the massacre of *Pieds-Noirs* civilians by the FLN near the town of **Philippeville** (now known as Skikda) in August 1955. Before this operation, FLN policy was to attack only military and government-related targets. The commander of the Constantine region, however, decided a drastic escalation was needed. The killing by the FLN and its supporters of 123 civilians, elderly women, and babies, including 71 French, shocked the French governor into calling for more repressive measures against the rebels.

Afterward, the planned French withdrawal led to a state crisis, various assassination attempts on the French president **Charles de Gaulle**, and attempts at military coups. Most of the former were carried out by an underground organization formed mainly from French military personnel supporting a French Algeria, which committed a large number of bombings and murders both in Algeria and in the homeland to stop the planned independence.

Other Independence Movements

France's exile of **Morocco's** sultan and his

replacement by an unpopular ruler sparked active opposition to French and Spanish rule and led to Moroccan independence in 1956.

In May 1960, a growing nationalist movement in **Congo** led by Patrice Lumumba, won the parliamentary elections. On June 30, 1960, the Congo gained independence from Belgium. During the Congo Crisis, military leader **Joseph-Desiré Mobutu** ousted the nationalist government of Patrice Lumumba and eventually took authoritarian control of the Congo, renaming it **Zaire** in 1971, and attempted to purge the country of all colonial cultural influence. For the most part, Zaire enjoyed warm relations with the United States because of its anti-communist stance, receiving substantial financial aid throughout the Cold War.

A military coup in **Libya** in 1969 overthrew King **Idris I**, beginning a period of sweeping social reform led by **Muammar al-Gaddafi**, who was ultimately able to fully concentrate power in his own hands during the Libyan Cultural Revolution, remaining in power until the Libyan Civil War of 2011.

In 1965, the conservative white minority government in **Rhodesia** unilaterally declared independence from the United Kingdom but did not achieve internationally recognized sovereignty until 1980 as **Zimbabwe**. **Robert Mugabe** rose to prominence in the 1960s and ruled the nation from 1980 until ousted in 1997, establishing a dictatorship that caused widespread human rights violations and economic depression.

South Africa: Apartheid

Much of South Africa's history is characterized by clashes of culture, violent territorial disputes between European settlers and indigenous people, dispossession and repression, and other racial and political tensions. Following the defeat of the Boers in the Second Boer War (1899–1902), the Union of South Africa was created as a dominion of the British Empire, which unified into one entity the four previously separate British colonies: Cape Colony, Natal Colony, Transvaal Colony, and Orange River Colony.

Dissatisfaction with British influence in the Union's affairs reached a climax in September 1914, when impoverished Boers, anti-British Boers, and bitter-enders launched a rebellion. The rebellion was quashed and at least one officer was sentenced to death and executed by firing squad.

In 1924 the Afrikaner-dominated National Party came to power in a coalition government with the Labour Party. Afrikaans, previously regarded as a low-level Dutch *patois*, replaced Dutch as an official language of the Union. English and Dutch became the official languages in 1925.

Sharpeville Massacre

"The Pan-Africanist Congress (PAC), a splinter group of the African National Congress (ANC) created in 1959, organized a countrywide demonstration for March 21, 1960, for the abolition of South Africa's pass laws. Participants were instructed to surrender their reference books (passes) and invite arrest. Some 20,000 Blacks gathered near a police station at Sharpeville, located about 30 miles (50 km) south of Johannesburg. After some demonstrators, according to police, began stoning police officers and their armored cars, the officers opened fire on them with submachine guns. About 69 Blacks were killed and more than 180 wounded, some 50 women and children being among the victims. A state of emergency was declared in South Africa, more than 11,000 people were detained, and the PAC and ANC were outlawed. Reports of the incident helped focus international criticism on South Africa's apartheid policy."

— Source: Britannica.com

The Union of South Africa came to an end after a referendum on October 5, 1960, in which a majority of white South Africans voted in favor of unilateral withdrawal from the British Commonwealth and the establishment of a **Republic of South Africa**.

The National Party in South Africa imposed apartheid in 1948, which institutionalized racial segregation through a series of legislation that established strict racial classification, forced relocation of nonwhites to "tribal homelands," and segregated public facilities and institutions.

Apartheid was a system of institutionalized racial segregation and discrimination in South Africa between 1948 and 1991. Broadly speaking, apartheid was delineated into *petty apartheid*, which entailed the segregation of public facilities and social events, and *grand apartheid*, which dictated housing and employment opportunities by race. Prior to the 1940s, some vestiges of apartheid had already emerged in the form of minority rule by white South Africans and the socially enforced separation of black South Africans from other races, which later extended to pass laws and land apportionment. Racist legislation during the apartheid era was a continuation and extension of discriminatory and segregationist laws forming a continuum that had commenced in 1856 under Dutch rule in the Cape and continued throughout the country under British colonialism. Apartheid as a policy was embraced by the South African government shortly after the ascension of the National Party (NP) during the country's 1948 general elections.

Lesson Eight

History Overview and Assignments Ongoing Arab-Israeli Conflict

THE SIX-DAY WAR of 1967, which had its origins in the ongoing tense relations between Israel and its neighboring Arab nations, was a decisive victory for Israel, tripling its territory from before the war. The Yom Kippur War was fought by a coalition of Arab states led by Egypt and Syria against Israel from October 6 to 25, 1973. The fighting mostly took place in the Sinai and the Golan Heights, territories that had been occupied by Israel since the Six-Day War. Egyptian President Anwar Sadat wanted also to reopen the Suez Canal. Neither specifically planned to destroy Israel, although the Israeli leaders could not be sure of that.

Suggested Reading and Assignments

- Review the discussion questions then read the article: *Israel and Palestine: The Six-Day War*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Continue to work on the **John F. Kennedy** quotation assignment as described in Lesson One.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

Six-Day War	East Jerusalem	Yom Kippur War
Gamal Abdel Nasser	West Bank	Khartoum Arab Summit
Gaza Strip	Golan Heights	
Sinai Peninsula	Israel Defense Forces (IDF)	

Discussion Questions

1. When was the Six-Day War fought, and between what countries?
2. Describe the incidents that led to the war.
3. How did Israel gain air superiority and control of the Gaza Strip and Sinai Peninsula?
4. What claim did Egyptian leader Gamal Abdel Nasser make to gain support from Syria and Jordan?
5. How did Israel gain control of the West Bank, East Jerusalem, and the Golan Heights?
6. In what way did overconfidence hurt the Israeli defense forces later?
7. What happened to minority Jews in Arab nations afterward?
8. What offer did the Israeli government make after the war?
9. How did Arab perception of the conflict shift after the Khartoum Arab Summit?

Adapted for High School from:

Boundless US and/or World History

source: courses.lumenlearning.com

Israel and Palestine: The Six-Day War

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Six-Day War

The **Six-Day War**, which had its origins in the ongoing tense relations between Israel and its neighboring Arab nations, was a decisive victory for Israel, tripling its territory from before the war. The Six-Day War, also known as the June War, 1967 Arab-Israeli War, or Third Arab-Israeli War, was fought between June 5 and 10, 1967, by Israel and the neighboring states of Egypt (known at the time as the United Arab Republic), Jordan, and Syria.

Origins of the Conflict

The origins of the Six-Day War include both longstanding and immediate issues. At this time, the earlier foundation of Israel, the resulting Palestinian refugee issue, and Israel's participation in the invasion of Egypt during the Suez crisis of 1956 were significant grievances for the Arab world. Arab nationalists, led by Egyptian President **Gamal Abdel Nasser**, continued to be hostile to Israel's

existence and made grave threats against its Jewish population. By the mid-1960s, relations between Israel and its Arab neighbors had deteriorated to the extent that a number of border clashes had taken place.

In April 1967, Syria shot at an Israeli tractor plowing in the demilitarized zone, which escalated to a prewar aerial clash. In May 1967, following misinformation about Israeli intentions provided by the Soviet Union, Egypt expelled UN peacekeepers who had been stationed in the Sinai Peninsula since the Suez conflict, and announced a blockade of Israel's access to the Red Sea (international waters) via the Straits of Tiran, which Israel considered an act of war. Tension escalated, with both sides' armies mobilizing. Less than a month later, Israel launched a series of preemptive airstrikes against Egyptian airfields.

The Egyptians were caught by surprise, and nearly the entire Egyptian air force was destroyed

with few Israeli losses, giving the Israelis air superiority. Simultaneously, the Israelis launched a ground offensive into the **Gaza Strip** and the **Sinai Peninsula**, which again caught the Egyptians by surprise. After some initial resistance, Nasser ordered the evacuation of the Sinai. Israeli forces rushed westward in pursuit of the Egyptians, inflicted heavy losses, and conquered the peninsula.

Nasser induced Syria and Jordan to begin attacks on Israel by using the initially confused situation to claim that Egypt defeated the Israeli air strike. Israeli counterattacks resulted in the seizure of **East Jerusalem** and the **West Bank** from the Jordanians, while Israel's retaliation against Syria resulted in its occupation of the **Golan Heights**.

On June 11, a ceasefire was signed. Arab casualties were far heavier than those of Israel: fewer than a thousand Israelis were killed compared to over 20,000 from the Arab forces. Israel's military success was attributed to the element of surprise, an innovative and well-executed battle plan, and the poor quality and leadership of the Arab forces.

As a result of the war, Israel gained control of the Gaza Strip and the Sinai Peninsula from Egypt, the West Bank and East Jerusalem from Jordan, and the Golan Heights from Syria. Israeli morale and international prestige were greatly increased by the outcome of the war, and the area under Israeli control tripled. However, the speed and ease of Israel's victory would lead to a dangerous overconfidence within the ranks of the **Israel Defense Forces (IDF)**, contributing to initial Arab successes in the subsequent 1973 **Yom Kippur War**. In this conflict, a broken ceasefire between Israel and the Arab states after an Egyptian/Syrian invasion of the Sinai on the Israeli holy day Yom Kippur dangerously heightened tensions between their allies the US and the USSR, until a second ceasefire halted the fighting.

The displacement of civilian populations resulting from the Six-Day War would have long-term consequences, as 300,000 Palestinians fled the West Bank and about 100,000 Syrians left the Golan to become refugees. Across the Arab world, Jewish minority communities were expelled, with refugees going to Israel or Europe.

Results of the Six-Day War

Israel gained control of the Gaza Strip and the Sinai Peninsula from Egypt, the West Bank and East Jerusalem from Jordan, and the Golan Heights from Syria.

Aftermath

The political importance of the 1967 War was immense; Israel demonstrated that it was able and willing to initiate strategic strikes that could change the regional balance. Egypt and Syria learned tactical lessons and would launch an attack in 1973 in an attempt to reclaim their lost territory.

Following the war, Israel experienced a wave of national euphoria, and the press praised the military's performance for weeks afterward. New "victory coins" were minted to celebrate. In addition, the world's interest in Israel grew, and the country's economy, which had been in crisis before the war, flourished due to an influx of tourists and donations, as well as the extraction of oil from the Sinai's wells.

In the Arab nations, populations of minority Jews faced persecution and expulsion following the Israeli victory. According to historian and ambassador Michael B. Oren:

Mobs attacked Jewish neighborhoods in Egypt, Yemen, Lebanon, Tunisia, and Morocco, burning synagogues and assaulting residents. A pogrom in Tripoli, Libya, left 18 Jews dead and 25 injured; the survivors were herded into detention centers. Of Egypt's 4,000 Jews, 800 were arrested, including the chief rabbis of both Cairo and Alexandria, and their property sequestered by the government. The ancient communities of Damascus and Baghdad were placed under house arrest, their leaders imprisoned and fined. A total of 7,000 Jews were expelled, many with merely a satchel.

Following the war, Israel made an offer for peace that included the return of most of the recently captured territories. According to Chaim Herzog, sixth president of Israel:

On June 19, 1967, the National Unity Government [of Israel] voted unanimously to return the Sinai to Egypt and the Golan Heights to Syria in return for peace agreements. The Golans would have to be demilitarized and special arrangement would be negotiated for the Straits of Tiran. The government also resolved to open negotiations with King Hussein of Jordan regarding the Eastern border.

In September, the **Khartoum Arab Summit** resolved that there would be "no peace, no recognition and no negotiation with Israel." As Avraham Sela notes, the Khartoum conference effectively marked a shift in the perception of the conflict by the Arab states away from one centered on the question of Israel's legitimacy to one focusing on territories and boundaries.

The Artios Home Companion Series

Unit 26: The Ford and Carter Years

Teacher Overview

WHEN PRESIDENT NIXON resigned in 1974 over the controversy of the Watergate scandal, Vice President Gerald Ford assumed the presidency. As president, Ford signed the Helsinki Accords, marking a move toward détente in the Cold War. With the conquest of South Vietnam by North Vietnam nine months into his presidency, US involvement in Vietnam essentially ended. Domestically, Ford presided over arguably the weakest economy since the Great Depression, with growing inflation, an energy crisis, and a recession during his tenure. During Ford's incumbency, foreign policy was characterized by the increased role Congress began to play, and by the corresponding curb on the powers of the President.

In 1976, Jimmy Carter ran on an “anti-Washington” ticket, making a virtue of his lack of experience in what was increasingly seen as the corrupt politics of the nation's capital. Accepting his party's nomination, the former governor of Georgia pledged to combat racism and sexism, as well as overhaul the tax structure. He openly proclaimed his faith as a born-again Christian and promised to change the welfare system and provide comprehensive healthcare coverage for neglected citizens who deserved compassion. Most importantly, Jimmy Carter promised that he would “never lie.” While he was known and lauded for his honesty and integrity, he was not politically experienced enough to be successful in working with Congress to achieve his goals. The energy crisis and foreign troubles worsened during his administration, and he was not reelected in 1980.

Women were often excluded from the highest paying positions and frequently received lower wages than their male counterparts performing the same types of jobs. They could not legally own property in some states, and widows sometimes lost the credit rating they had achieved with their husbands (while widowers did not). Clearly certain reforms were needed, and Congress and state legislatures responded with legislation prohibiting gender discrimination in the workplace. But radical feminist goals went further, demanding such things as legalization of abortion and an Equal Rights Amendment to the Constitution.

Another battle cry was sounded against pollution, and the environmental movement was born. Organizations, ranging from anti-humanists to promoters of recycling, formed in support of regulations of various types. Congress passed a number of laws, and the Environmental Protection Agency was established in 1970.

While these concerns occupied American attention, turmoil was stirring in the Middle East.



Israeli Prime Minister Menachem Begin and Egyptian President Anwar Sadat shake hands at Camp David (1978).

Suggested Assignments

In this unit, students will:

- Complete five lessons in which they will learn about the **Ford and Carter years**, including **women's rights**, **environmental reform**, and **identity politics**, journaling and answering discussion questions as they read.
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

God’s Word tells us there will be times for both war and peace.

A time to love, and a time to hate; a time for war, and a time for peace.

– Ecclesiastes 3:8

“The only thing necessary for the triumph of evil is for good men to do nothing.” – Edmund Burke

When the righteous increase, the people rejoice: but when the wicked rule, the people groan.

– Proverbs 29:2

Before God, all men and women are created equal.

There is neither Jew nor Gentile, neither slave nor free, nor is there male and female, for you are all one in Christ Jesus.

– Galatians 3:28 (review)

Lesson One

History Overview and Assignments The Ford Administration

ALTHOUGH GERALD FORD served as vice president and then as president of the United States, he wasn’t elected to either office by the American public. Republican Gerald Ford became vice president following Spiro Agnew’s resignation in 1973, amidst allegations of extortion, fraud, and bribery. Ford then became president in August of 1974, following Nixon’s resignation over the Watergate scandal. As president for the remainder of Nixon’s term, Ford signed the Helsinki Accords, marking a move toward détente in the Cold War. With the conquest of South Vietnam by North Vietnam nine months into Ford’s presidency, US involvement in Vietnam essentially ended. Domestically, Ford presided over arguably the weakest economy since the Great Depression, with growing inflation and a recession during his tenure. One of his more controversial acts was to grant a full pardon to former President Nixon for his role in the Watergate scandal, and he was defeated in the 1976 election by Jimmy Carter.



Gerald Ford’s presidential portrait

The Ford Administration. The URL for the article can be found on your **ArtiosHCS** curriculum website. *Note: Read the full webpage for this lesson.*

- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

Spiro Agnew	Human Rights Watch
Helsinki Accords	Proclamation 4311
“Whip Inflation Now”	United States Bicentennial
Education for All Handicapped Children Act of 1975	

Discussion Questions

1. What was controversial about Proclamation 4311?
2. What were the Helsinki Accords? You will have to do outside research to answer this.
3. What economic challenges did Ford’s administration face?

Suggested Reading and Assignments

- Review the discussion questions then read the online article:

Lesson Two

History Overview and Assignments The Carter Administration

DEMOCRAT JIMMY CARTER served as the 39th President of the United States from 1977 to 1981. As a gifted student and former governor of Georgia, he was relatively inexperienced in politics. His administration sought to make the government “competent and compassionate.” However, in the midst of an economic crisis produced by rising energy prices and “stagflation,” he met with difficulty in achieving his objectives. The final year of his presidential tenure was marked by several major crises, including the 1979 takeover of the American embassy in Iran, an unsuccessful rescue attempt of the hostages, serious fuel shortages, and the Soviet invasion of Afghanistan.



Jimmy Carter's presidential portrait

Suggested Reading and Assignments

- Review the discussion questions then read the online article: *The Carter Administration*. The URL for the article can be found on your **ArtiosHCS** curriculum website. *Note: Read the full webpage for this lesson.*
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

1979 Iran Hostage Crisis
Soviet Invasion of Afghanistan
United States Department of Education
United States Department of Energy

Camp David Accords
Panama Canal Treaties
Strategic Arms Limitation Talks (SALT II)
1980 Summer Olympics in Moscow

Discussion Questions

1. What was Carter's desire for the American government?
2. What difficulties did he face during his presidential tenure?
3. With what two historically antagonistic countries was he successful in brokering the beginnings of peace?
4. Was he successful in gaining freedom for the American hostages in Iran?

Lesson Three

History Overview and Assignments Cultural Crises

THE EQUAL RIGHTS AMENDMENT, first proposed in Congress by the National Women’s Party in 1923, was viewed by feminists as the only clear-cut way to eliminate all legal gender-based discrimination in the United States. Others, however, argued that the ERA would bring many undesirable changes to American women, and by 1982, the year of expiration, only 35 states had voted in favor of the ERA—three states shy of the necessary total. Meanwhile, ecologists who studied the relationships between living organisms and their environments warned that pollution was destroying this delicate balance, and the result could be health problems, extinction of species, or even planetary destruction. In response to these and other crises, the American culture responded by turning inward and seeking means of escape.



Line at a gas station in Maryland on June 15, 1978
Photo by Warren K. Leffler

Suggested Reading and Assignments

- Review the discussion questions then read three online articles: *The Equal Rights Amendment*, *Environmental Reform*, and *A Time of Malaise*. The URL for each article can be found on your **ArtiosHCS** curriculum website.
- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

Equal Rights Amendment (ERA)
Alice Paul
Gloria Steinem
Phyllis Schlafly
Iron Eyes Cody
Rachel Carson

Silent Spring
DDT
Wilderness Protection Act
Water Quality Act
Air Quality Act

Greenpeace
Earth Day
Environmental Protection Agency
Three Mile Island
Oil embargo

Discussion Questions

1. Describe the ratification process for amending the US Constitution.
2. What concerns did conservatives have about the ERA?
3. What concern did Rachel Carson raise in her book *Silent Spring*?
4. List the steps Presidents Johnson and Nixon took in response to pressures to protect the environment.
5. Describe the differences between conservationists, preservationists, and ecologists.
6. What happened at Three Mile Island in 1979?
7. List the causes of the cultural malaise of the 1970s and describe some of the ways the American culture responded.
8. Evaluate these responses Biblically.

Lesson Four

History Overview and Assignments Monarchies of the Middle East

SAUDI ARABIA, an absolute monarchy organized around Sunni Islam and home to the second largest oil reserves in the world, has enjoyed friendly relations with the West, especially the United States. Jordan is a constitutional monarchy known as one of the safest and most hospitable countries in the region, accepting refugees from almost all surrounding conflicts as early as 1948, with an estimated 2.1 million Palestinians and 1.4 million Syrian refugees residing in there. The emirates of the Middle East (the United Arab Emirates, Qatar, and Kuwait) are monarchies ruled by emirs and represent some of the wealthiest Arab nations. OPEC, whose members are largely from the Middle East, is an oil cartel created in 1960 to counterbalance the political and economic power of the mostly US-based multinational oil companies known as the “Seven Sisters.”



Riyadh Skyline Is Growing. Riyadh is the financial center of Saudi Arabia.

Own work-B.alotaby February 2018, CC BY-SA 4.0

Key People, Places, and Events

Kingdom of Saudi Arabia	Qatar
Sunni Islam	Kuwait
Ibn Saud	OPEC
Wahhabism	1973 oil crisis
Hashemite Kingdom of Jordan	1979 oil crisis
United Arab Emirates	Iran-Iraq War
Iranian Revolution	

Suggested Reading and Assignments

- Review the discussion questions then read the following online article: *The Monarchies of the Middle East*. The URL for the article can be found on your **ArtiosHCS** curriculum website. *Note: Read the full webpage for this lesson.*
- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. How was the Kingdom of Saudi Arabia founded?
2. What happened there in 1938 that drastically changed its economic status?
3. Describe Sunni Islam and how its distinction from Shia Islam arose.
4. Describe Saudi Arabia’s governmental structure.
5. Name the current King of Saudi Arabia.
6. List Saudi Arabia’s stated foreign policy objectives and main practical concerns.
7. Trace the history of Jordan’s government to the Bronze Age.
8. What factors have hampered Jordan’s economic growth?
9. Describe the United Arab Emirates’ governmental structure.
10. For what practices is the UAE criticized by human rights advocates?
11. Which Middle Eastern country has the highest per capita income in the world?
12. What happened in 1990 in Kuwait?
13. How was this resolved?
14. What kind of governmental system does Kuwait have?
15. What is OPEC, and what is its stated aim?
16. How did the 1973 oil crisis begin?

Lesson Five

History Overview and Assignments Iran

AFTER A COUP in 1953 to overthrow Iran's prime minister Mohammad Mosaddegh, the Shah of Iran, Reza Pahlavi, became increasingly autocratic, and the country entered a phase of modernization, secularization, and close relations with the United States—all of which contributed to the Shah's overthrow in 1979 and the Pahlavi dynasty's replacement with an Islamic republic under the Grand Ayatollah Ruhollah Khomeini, the leader of the Iranian Revolution. The Shah's pro-Western, autocratic monarchy was replaced by government based on the principle of rule by Islamic jurists, which reversed most of the modernization and secularization of the prior regime. On September 22, 1980, the Iraqi army invaded the Iranian Khuzestan, and the Iran-Iraq War began. This conflict is often compared to World War I for its similar fighting tactics and brutality.



A view of North of Tehran from Aab o Aatash
(Water & Fire) Park
By ninara. CC BY 2.5

Key People, Places, and Events

Mohammad Reza Shah Pahlavi
Mohammad Mosaddegh
Iranian Revolution
Ruhollah Khomeini
Iran Hostage Crisis
Iran-Iraq War
Saddam Hussein
Kurds

Suggested Reading and Assignments

- Review the discussion questions then read the following online article: *Iran*. The URL for the article can be found on your **ArtiosHCS** curriculum website. *Note: Read the full webpage for this lesson.*
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Discussion Questions

1. What major change took place in Iran in 1953?
2. What other major event took place in 1979?
3. Who became leader of Iran after the Iranian Revolution?
4. What criticisms were launched at Shah Mohammad Reza Pahlavi's regime?
5. Describe Iran's government before and after the 1979 revolution.
6. List several ways life changed for Iranian women after the revolution.
7. Describe the events and the end of the Iran Hostage Crisis of 1979.
8. List four incidents of Islamist uprisings in other countries after Iran's 1979 revolution.
9. How did the Iran-Iraq War begin?
10. List the main events of this war.
11. In what ways was this war similar to World War I?
12. What was Saddam's goal in the war?
13. What were the results of the war in terms of death numbers and territory shifts?

The Artios Home Companion Series

Unit 27: The Reagan and Bush 41 Years

Teacher Overview

AMERICANS WERE FED UP!

In 1980, confidence in the American economy and government hit rock bottom. Looking for a change and the promise of a better future, voters turned to Ronald Reagan for answers.

In Reagan's opinion, government needed to be trimmed, taxes were too high, military spending should be increased, and morality needed to be reemphasized in American life—but the United States was still the largest superpower in the world with the best system of government. It was time to make some improvements and feel good about being an American again!

Unfortunately, the 1980s were also decade of scandals, and the Iran-Contra Affair proved that White House officials were willing to disregard the law to carry out their political agenda.

George H.W. Bush, sometimes called Bush 41 since he was America's 41st president (and his son George W. Bush later became the 43rd) arrived at the presidency during a period of great change in the world—the fall of the Berlin Wall and the collapse of Soviet Union came early in his presidency. Bush ordered military operations in Panama and the Persian Gulf, and at one point he was recorded as having a record-high approval rating of 89%. The United States received a boost of confidence when the Cold War came to an end in 1991. The menace of a threatening Soviet Union now belonged to history, and the United States claimed the status of the only remaining superpower in the world. However, economic recession and Bush breaking his “no new taxes” pledge caused a sharp decline in his approval rating, and he was defeated in the 1992 election.



Vice President Bush (left) standing with President Ronald Reagan (center) and Soviet leader Mikhail Gorbachev (right) on the New York City waterfront in 1988

Series: Reagan White House Photographs, 1/20/1981 - 1/20/1989
Collection: White House Photographic Collection, 1/20/1981 - 1/20/1989 - <https://catalog.archives.gov>



The Cabinet of President Reagan in 1981

Suggested Assignments

In this unit, students will:

- Complete four lessons in which they will learn about the **Reagan** and **George H.W. Bush** years, journaling and answering discussion questions as they read.
- Conduct research on either **Ronald Reagan** or **Mikhail Gorbachev**, on his life, career, and accomplishments. They will write a 4-5 page paper on the chosen individual and be prepared to share what they learned.
- Watch President Reagan’s “Tear Down This Wall” speech in its entirety.
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

God is sovereign over the affairs of men.

And He made from one man every nation of mankind to live on all the face of the earth, having determined allotted periods and the boundaries of their dwelling place.

– Acts 17:26 (review)

Dishonesty is sin and will be punished.

Whoever walks in integrity walks securely, but he who makes his ways crooked will be found out.

– Proverbs 10:9

Lesson One

History Overview and Assignments “Morning in America”

RONALD REAGAN’S message was clear: government had become too big and needed to be trimmed down, taxes were insanely high and needed to be cut in order to stimulate growth and investment, military spending should be increased to block Communist expansion and fix the degenerating state of the American war machine, morality and character needed to be reemphasized in American life—but the United States was still the best country in the world. It was time to feel good about being an American again!



Ronald Reagan (1981)
Official portrait of President Reagan



President and Mrs. Reagan at the 1981 inauguration parade. Ronald Reagan swept into office in 1980, capturing nearly 10 times as many electoral votes as his incumbent opponent Jimmy Carter. The Republican Party was also able to ride Reagan’s coattails to capture their first majority in the Senate since 1954.

Suggested Reading and Assignments

- Review the discussion questions then read the article: *The Reagan Administration*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Choose either **Ronald Reagan** or **Mikhail Gorbachev** and do additional research on his life, career, and accomplishments. Start a 4-5 page paper on the individual you choose and be prepared to share what you learn.
- Watch President Reagan's "Tear Down This Wall" speech in its entirety. The URL for it can be found on your **ArtiosHCS** curriculum website.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People and Events

Romania's 1989 Revolution	Halley's Comet	Ronald W. Reagan
Tiananmen Square	<i>Discovery</i>	"Reaganomics"
Mount St. Helens	MTV	Economic Recovery Tax Act of 1981
Live Aid	HBO	LGBT Movement
Chernobyl disaster	Showtime	HIV/AIDS
<i>Columbia</i>	Microsoft	AIDS Coalition to Unleash Power (ACT UP)
<i>Voyager</i>	MS-DOS	Mikhail Gorbachev
<i>Salyut 7</i>	Windows	Intermediate-Range Nuclear Forces (INF) Treaty
<i>Mir</i>	Tim Berners-Lee	
<i>Challenger</i>	Hypertext Transfer Protocol (HTTP)	

Discussion Questions

1. What were the foundational principles of Reagan's campaign?
2. Explain the argument behind "supply-side economics" and how lowering taxes was expected to raise tax revenues.
3. Describe "Reaganomics" and "trickle-down" economics.
4. List some of the criticisms launched at Reagan's economic policies.
5. How were "yuppies" different from "hippies"?
6. What dangerous misconception did many heterosexual people have early on about HIV/AIDS?
7. What historical events were prominent in Reagan's second term?

Adapted for High School from:

Boundless US History

source: courses.lumenlearning.com

The Reagan Administration

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The 1980s

*The 1980s was an eventful decade, marked by major geopolitical shifts, advances in digital and genetic technology, economic destruction in some regions and growth in others, civil discontent and violence, tremendous population growth, and natural disasters. As the Cold War between the US and the USSR came toward a close, terrorist activities and violent conflicts arose in regions such as the Middle East and South America, and revolutionary efforts sought to overthrow tyrannical governments in Eastern Europe. **Romania's 1989 Revolution** executed its leader, and student-led demonstrations in **Tiananmen Square** in Beijing the same year resulted in the tragic massacre of hundreds, if not thousands of*

protesters seeking democracy. Canada, Australia, New Zealand, Zimbabwe, and several island countries gained independence from the United Kingdom during the 1980s.

*At the beginning of the decade, **Mount St. Helens** exploded in Washington State, in the most destructive volcanic event in American history. Then widespread famine struck Ethiopia in the mid-80s, prompting worldwide efforts such as a simultaneous group of concerts called **Live Aid** to provide monetary help, and an accident at the **Chernobyl Nuclear Power Plant** in the Soviet Union created the worst nuclear disaster in history.*

*Space exploration began the decade with the launch of the American space shuttle **Columbia** in*

1981, the **Voyager** probes reaching Saturn, Uranus, and Neptune before exiting the Solar System, and the Soviet space stations **Salyut 7** and **Mir**. The world mourned the tragic explosion of the space shuttle **Challenger** in January of 1986, but **Halley's Comet** blazed through the skies shortly afterward, and manned American flights resumed with the launch of **Discovery** in 1988.

In popular culture, **MTV** launched the era of the music video, with pop artists such as Michael Jackson, Cyndi Lauper, and Madonna capitalizing on its success with extravagant visual performances, while blockbuster films such as *The Empire Strikes Back* and *Top Gun*, and “teen flicks” and horror movies like *Flashdance* and *Poltergeist*, thrilled youthful audiences while launching careers of high-profile celebrities. Cable television, along with **HBO** and **Showtime**, persuaded viewers to pay for programming, and video gaming systems such as Atari and Nintendo became wildly popular.

Arguably the most impactful cultural changes, though, were brought by the advances in computer technology. Once Microsoft released its **MS-DOS** operating system in 1981, the **Windows** system completely revolutionized the industry, making personal computing feasible. In 1989, the first successful means of communication was pioneered by British computer scientist **Tim Berners-Lee** between a **Hypertext Transfer Protocol (HTTP)** client and server via the internet. In the following years he developed the system which became known as the World Wide Web.

Ronald Reagan's Administration Republican: 1981-1989

Ronald Wilson Reagan (February 6, 1911-June 5, 2004) was the 40th President of the United States. Prior to that, he was governor of California from 1967 to 1975, and a radio, film, and television actor.

Born in Tampico, Illinois, and raised in Dixon, Reagan was educated at Eureka College, earning a Bachelor of Arts degree in economics and sociology. After his graduation, Reagan moved first to Iowa to work as a radio broadcaster, and then to Los Angeles in 1937, where he began a career as an actor—first in films and later in television. Some of his most notable films include *Knute Rockne*, *All American*, *Kings Row*, and *Bedtime For Bonzo*. Reagan served as president of the Screen Actors Guild and later as a spokesman for General Electric (GE); his start in politics occurred during his work for GE. Originally a member of the Democratic Party, his positions

began shifting rightward in the late 1950s, and he switched to the Republican party in 1962. After delivering a rousing speech in support of Barry Goldwater's presidential candidacy in 1964, he was persuaded to seek the California governorship, winning two years later and again in 1970. He was defeated in his run for the Republican presidential nomination in 1968 and 1976 but won both the nomination and general election in 1980, defeating incumbent president Jimmy Carter.

Free Enterprise Economics and Reaganomics

Reagan's primary goal upon taking office was to stimulate the sagging economy while simultaneously cutting both government programs and taxes. His economic policies, called “**Reaganomics**” by the press, were based on a theory called supply-side economics, about which many economists were skeptical. The four pillars of Reagan's economic policy were to reduce the growth of government spending, reduce income tax and capital gains tax, reduce government regulation of economy, and control money supply to reduce inflation.

Reagan was an articulate spokesman for his political perspectives and was able to garner support for his policies. Often called “The Great Communicator,” he was noted for his ability, honed through years as an actor and spokesperson, to convey a mixture of empathy and concern, while taking humorous digs at his opponents. In his 1980 campaign speeches, Reagan presented his economic proposals as merely a return to the free-enterprise principles that had been in favor before the Great Depression. Americans found this rhetorical style extremely compelling. Public support for the plan, combined with a surge in the President's popularity after he survived an assassination attempt in March 1981, swayed Congress, including many Democrats. On July 29, 1981, Congress passed the **Economic Recovery Tax Act**, which phased in a 25% overall reduction in taxes over a period of three years.

Budget Cuts

Reagan's policies proposed that economic growth would occur when marginal tax rates were low enough to spur investment, which would then lead to increased economic growth, higher employment, and higher wages. Critics labeled this “trickle-down economics”—the belief that tax policies that benefit the wealthy will create a “trickle-down” effect to the poor.

Questions arose about whether Reagan's policies benefited the wealthy more than those living in poverty, and many poor and minority citizens viewed Reagan as indifferent to their struggles. These views were exacerbated by the fact that Reagan's economic regimen included freezing the minimum wage at \$3.35 an hour, slashing federal assistance to local governments by 60%, cutting the budget for public housing and Section 8 rent subsidies in half, and eliminating the antipoverty Community Development Block Grant program. The widening gap between the rich and poor had already begun during the 1970s before Reagan's economic policies took effect. Along with Reagan's 1981 cut in the top regular tax rate on unearned income, he reduced the maximum capital gains rate to only 20%—its lowest level since the Hoover administration.

Deregulating the Economy

Reagan also focused on deregulating industry and weakening the power of labor unions. Banks and savings and loan associations were deregulated. Pollution control was enforced less strictly by the Environmental Protection Agency, and restrictions on logging and drilling for oil on public lands were relaxed. Believing the free market was self-regulating, the Reagan administration had little use for labor unions, and in 1981, the President fired 12,000 federal air traffic controllers who had gone on strike to secure better working conditions (which would also have improved the public's safety). His action effectively destroyed the Professional Air Traffic Controllers Organization (PATCO) and ushered in a new era of labor relations in which, following his example, employers simply replaced striking workers. The weakening of unions contributed to the leveling off of real wages for the average American family during the 1980s.

Inflation and Unemployment Rates

President Ronald Reagan's tenure marked a time of economic prosperity for some Americans and the opposite for many others. Reagan's economic policymakers succeeded in breaking the cycle of stagflation that had been plaguing the nation, but at significant cost. In its effort to curb high inflation with dramatically increased interest rates, the Federal Reserve also triggered a deep recession. Inflation did drop during Reagan's presidency but borrowing became expensive and consumers spent less.

In Reagan's first years in office, bankruptcies

increased, and unemployment reached about 10%, its highest level since the Great Depression. Homelessness became a significant problem in cities, a fact the President made light of by suggesting that the press exaggerated the problem and that many homeless people chose to live on the streets. Economic growth resumed in 1983, and gross domestic product (GDP) grew at an average of 4.5% during the rest of his presidency. By the end of Reagan's second term in office, unemployment had dropped to about 5.3%, but the nation was nearly \$3 trillion in debt. An increase in defense spending coupled with \$3.6 billion in tax relief for the 162,000 American families with incomes of \$200,000 or more made a balanced budget, one of the President's campaign promises in 1980, impossible to achieve.

Low income groups were also affected by the reduction of social spending, and inequality throughout the nation increased. The share of total income received by the top 5% highest-earning households grew from 16.5% in 1980 to 18.3% in 1988. In contrast, the share of total income of the lowest fifth of households fell from 4.2% in 1980 to 3.8% in 1988.

The National Debt

In order to cover newly spawned federal budget deficits, the United States borrowed heavily both domestically and abroad, raising the national debt from \$997 billion to \$2.85 trillion. As a result, the United States went from being the world's largest international creditor to becoming the world's largest debtor. Reagan described the new debt as the "greatest disappointment" of his presidency.

US Culture: From Hippies to Yuppies

The Reagan years were a complicated era of social, economic, and political change, with many trends operating simultaneously and sometimes at cross-purposes. While many suffered, others prospered. The 1970s had been the era of the hippie, and *Newsweek* magazine declared 1984 to be the "year of the Yuppie." Yuppies, whose name derived from "(y)oung, (u)rban (p)rofessionals," were akin to hippies in being young people whose interests, values, and lifestyle influenced American culture, economy, and politics, just as the hippies' credo had done in the late 1960s and 1970s. Unlike hippies, however, yuppies tended to be materialistic and focused on image, comfort, and economic prosperity. Although liberal on some social issues, they were economically conservative. Ironically, some yuppies

were former hippies who gave up their crusade against “the establishment” to become businessmen.

Battles in the Courts and Congress

Both his Supreme Court nominations and his lower court appointments were in line with Reagan’s expressed philosophy that judges should interpret law as enacted and not “legislate from the bench.” By the end of the 1980s, a conservative majority on the Supreme Court had put an end to the perceived “activist” trend begun under the leadership of Chief Justice Earl Warren. Some argued that the conservative justices were equally activist, but that their sympathies lay with corporate America, rather than with civil rights. However, general adherence to the principle of *stare decisis* (the legal principle of determining points in litigation according to precedent), along with minority support, left most of the major landmark case decisions (such as *Brown*, *Miranda*, and *Roe v. Wade*) of the previous three decades still standing as binding precedent.

Relationship With Congress

Reagan’s support for an increased defense budget at the height of the Cold War was supported by Congressional Democrats and Republicans. However, Congress was reluctant to follow Reagan’s proposed cuts in domestic programs. In accordance with Reagan’s “less-government intervention” views, many domestic government programs were cut or experienced periods of reduced funding during his presidency; these included Social Security, Medicaid, food stamps, and federal education programs. Though Reagan protected entitlement programs, such as Social Security and Medicare, in one of the most widely criticized actions of his administration, Reagan attempted to purge tens of thousands of people with disabilities from the Social Security disability roles, alleging they were not “truly disabled.” Funding for government organizations, including the Environmental Protection Agency, were also reduced. He cut the EPA’s budget by 22%, and his director of the EPA, Anne M. Burford, resigned over alleged mismanagement of funds. Tax breaks and increased military spending resulted in an increase of the national budget deficit and led Reagan and Congress to approve two tax increases, aiming to preserve funding for Social Security, though not as high as the 1981 tax cuts.

LGBT Movement

From the anarchistic Gay Liberation Movement

of the early 1970s arose a more reformist and single-issue **LGBT Movement** of the 80s and 90s. This new movement portrayed lesbian, gay, bisexual, and transgender people as a minority group and used the language of civil rights.

In the early 1980s, doctors noticed a disturbing trend—young homosexual men in large cities, especially San Francisco and New York, were being diagnosed with, and eventually dying from, a rare cancer called Kaposi’s sarcoma. Because the disease was seen almost exclusively in male homosexuals, it was quickly dubbed “gay cancer.” Doctors soon realized it often coincided with other symptoms, including a rare form of pneumonia, and they renamed it “gay related immune deficiency” (GRID), although people other than homosexual men, primarily intravenous drug users, were dying from the disease as well. The connection between gay men and GRID—later renamed human immunodeficiency virus/autoimmune deficiency syndrome, or **HIV/AIDS**—led heterosexuals to largely ignore the growing health crisis in the country, wrongly assuming they were safe from its effects. Even after it became apparent that heterosexuals could contract the disease through blood transfusions and heterosexual intercourse, HIV/AIDS continued to be associated primarily with the homosexual community. President Reagan, always politically careful, was reluctant to speak openly about the developing crisis, even as thousands faced certain death from the disease.

With little help coming from the government, the gay community quickly began to organize its own response. In 1982, New York City men formed the Gay Men’s Health Crisis (GMHC), a volunteer organization that operated an information hotline, provided counseling and legal assistance, and raised money for people with HIV/AIDS. Larry Kramer, one of the original members, left in 1983 and formed his own organization, the **AIDS Coalition to Unleash Power (ACT UP)**, in 1987. ACT UP took a more militant approach, holding demonstrations on Wall Street, outside the US Food and Drug Administration (FDA), and inside the New York Stock Exchange to call attention and shame the government into action. One of the images adopted by the group, a pink triangle paired with the phrase “Silence=Death,” captured media attention and quickly became the symbol of the AIDS crisis.

Reagan’s Second Term

Incumbent President Reagan was re-elected in

the election of 1984 in an electoral and popular vote landslide, winning 49 states. Reagan's second term was primarily marked by foreign matters. Publicly describing the Soviet Union as an "evil empire," he had supported anti-communist movements worldwide and spent his first term forgoing the strategy of détente by ordering a massive military buildup in an arms race with the Soviet Union. Later he negotiated with Soviet General Secretary **Mikhail Gorbachev**, culminating in the **Intermediate-Range Nuclear Forces (INF) Treaty** and the decrease of both countries' nuclear arsenals. Gorbachev's attempts at reform, as well as his reorientation of Soviet strategic aims and summit conferences with President Reagan, contributed to

the end of the Cold War and the dissolution of the Soviet Union.

Reagan left office in 1989. His presidency is credited for generating an ideological renaissance on the American political right.



Ronald Reagan waves just before he is shot outside a Washington hotel on March 30, 1981.

Lesson Two

History Overview and Assignments Reagan's Foreign Policy

PRESIDENT REAGAN initiated a large buildup of the American military with the intention of defeating the Soviet Union in an arms race. In 1983, Soviet Union fighter planes shot down a Korean Air commercial passenger plane, killing all 269 passengers, including a US congressman. This prompted a harsh diplomatic and economic response by President Reagan.

Under the Reagan Doctrine, the United States provided arms, training, and financial aid to anti-communist movements around the world, including Islamist Mujaheddin forces in Afghanistan.

The "Reagan Doctrine" offered support to anti-communist opposition in central Europe and worked against socialist and communist governments. During his presidency, Reagan also implemented the Strategic Defense Initiative, which attempted to create a missile-defense system. Critics challenged this plan as technologically unfeasible.



Reagan meeting with leaders of the Afghan Mujahideen in the Oval Office (1983)

Photo by Michael Evans. Ronald Reagan Presidential Library, US National Archives and Records Administration

Suggested Reading and Assignments

- Review the discussion questions then read the online article: *Reagan's Foreign Policy and the End of the Cold War*. The URL for the article can be found on your **ArtiosHCS** curriculum website. *Note: Read the full webpage for this lesson.*
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Continue to work on your 4-5 page paper on either **Ronald Reagan** or **Mikhail Gorbachev**.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People and Events

Pershing missile	Hezbollah	Manuel Noriega
Margaret Thatcher	1986 bombing of Libya	Invasion of Grenada
Korean Air Lines Flight 007	Iran-Contra Affair	Mikhail Gorbachev
Global Positioning System (GPS)	Sandinistas	Intermediate-Range Nuclear Forces (INF) Treaty
Reagan Doctrine	Daniel Ortega	<i>Perestroika</i> (“restructuring”)
“Vietnam Syndrome”	Saddam Hussein	<i>Glasnost</i> (“openness”)
Strategic Defense Initiative (SDI)	Oliver North	Strategic Arms Reduction Talks
Yuri Andropov	Tower Commission	Fall of the Berlin Wall
Beirut barracks bombing	School of the Americas	
Muammar al-Gaddafi		

Discussion Questions

1. Outline the means by which President Reagan carried out his Cold War strategy.
2. What did Reagan mean by the term “Vietnam Syndrome”?
3. What strategy did his administration implement in response, and what steps were taken?
4. Describe the SDI project and the criticisms launched against it.
5. What happened in Beirut on October 23, 1983?
6. What happened in Libya on April 15, 1986?
7. How did the UN respond to the event in Libya?
8. Summarize the Iran-Contra Affair and congressional response.
9. For what serious charges was the School of the Americas criticized?
10. Describe the relationship between the US and Manuel Noriega.
11. Summarize the events of and US justification for invading Grenada in 1983.
12. Describe the changing nature of Reagan’s talks with Soviet leadership after Mikhail Gorbachev came to power.
13. List the three main Cold War occurrences of 1989.
14. What was to follow two years later?

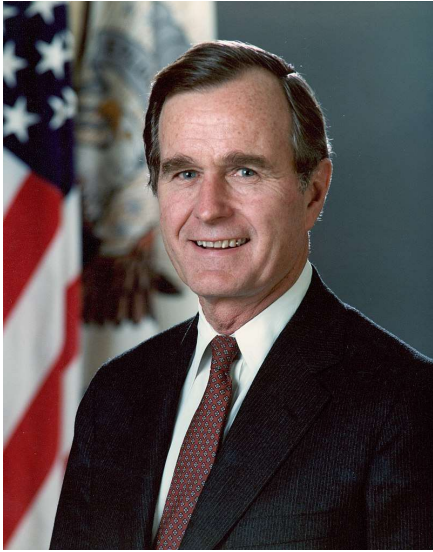
Lesson Three

History Overview and Assignments The George H.W. Bush Administration

DURING GEORGE H.W. BUSH’S presidency from 1989 to 1993, he negotiated the end of the Cold War, struggled with a large federal deficit, and signed several new laws. In 1989, just after the fall of the Berlin Wall, Bush met with Soviet General Secretary Mikhail Gorbachev in a conference in Malta; the meeting was acknowledged as a very important step to the end of the Cold War. In July of 1991, the Strategic Arms Reduction Treaty (START I) was signed by Bush and Gorbachev in Moscow. After the dissolution of the Soviet Union in 1991, Bush and Gorbachev declared a strategic partnership between the US and Russia, marking the official end of the Cold War. Bush’s administration, along with the Conservative Canadian Prime Minister, Brian Mulroney, spearheaded the negotiations of the North American Free Trade Agreement (NAFTA), which would eliminate the majority of tariffs on products traded among the United States, Canada, and Mexico.

Suggested Reading and Assignments

- Review the discussion questions then read the online article: *The George H.W. Bush Administration*. The URL for the article can be found on your ArtiosHCS curriculum website. *Note: Read the full webpage for this lesson.*
- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Continue working on your 4-5 page paper on either **Ronald Reagan** or **Mikhail Gorbachev**.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.



George Herbert Walker Bush (1981)
Department of Defense, Department of the Navy,
Naval Photographic Center

Key People and Events

Omnibus Budget Reconciliation Act of 1990
International Space Station
Americans With Disabilities Act of 1990
Clean Air Act
Immigration Act of 1990
National Rifle Association (NRA)
Strategic Arms Reduction Treaty (START I)
Brian Mulroney
North American Free Trade Agreement (NAFTA)
Panama War
“Operation Just Cause”
Gulf War
Invasion of Kuwait
Dick Cheney
Fahd of Saudi Arabia
Norman Schwarzkopf
Operation Desert Shield
Operation Desert Storm
Madrid Conference

Discussion Questions

1. What pledge did President Bush make about taxes during his 1988 campaign?
2. Was he successful in keep this pledge? Why or why not?
3. Summarize his “thousand points of light” agenda.
4. Describe Bush’s dispute with the NRA.
5. Summarize the provisions of NAFTA.
6. Briefly describe “Operation Just Cause” in Panama and the operation’s results.
7. What event in the Middle East triggered Operations Desert Shield and Desert Storm?
8. What resulted from these operations?
9. Analyze the relationship between the Gulf War and the American recession that began in 1987.
10. Identify the “unexpected twist” that influenced the results of the 1992 presidential election.



President Bush visiting American troops in Saudi Arabia on Thanksgiving Day (1990)

Lesson Four

History Overview and Assignments

Collapse of the Soviet Union

THE SOVIET UNION WAS DISSOLVED by the end of 1991, resulting in 14 countries (Armenia, Azerbaijan, Belarus, Estonia, Georgia, Kazakhstan, Kyrgyzstan, Latvia, Lithuania, Moldova, Tajikistan, Turkmenistan, Ukraine, and Uzbekistan) declaring their independence from the Soviet Union in 1990-91. Lithuania was the first Union Republic to declare independence from the dissolving Soviet Union in the Act of the Re-Establishment of the State of Lithuania, signed by the Supreme Council of the Republic of Lithuania on March 11, 1990. The Act of the Re-Establishment of the State of Lithuania served as a model and inspiration to other Soviet republics. However, the issue of independence was not immediately settled and recognition by other countries was uncertain. The rest of the Soviet Union, which constituted the bulk of the area, became Russia in December 1991.



People atop the Berlin Wall near the Brandenburg Gate on 9 November 1989. The text on the sign "Achtung! Sie verlassen jetzt West-Berlin" ("Notice! You are now leaving West Berlin") has been modified with an additional text "Wie denn?" ("How?")
Photo by Sue Ream, CC BY 3.0

Suggested Reading and Assignments

- Review the discussion questions then read the article: *Fall of the Soviet Union*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Complete your 4-5 page paper on either **Ronald Reagan** or **Mikhail Gorbachev**.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People and Events

fall of the Berlin Wall
Alexanderplatz demonstration
Politburo
Revolutions of 1989
Chernobyl disaster
Solidarity
Nicolae Ceausescu
Romanian Revolution
Boris Yeltsin

Discussion Questions

1. Trace the chain of events that led to the fall of the Berlin Wall.
2. Explain the effects of the Chernobyl disaster on the collapse of the Soviet Union.
3. Outline the events that followed, leading to the collapse.
4. Describe the role played by civil resistance in this process.
5. What effect did the Tiananmen Square massacre in Beijing have on the Eastern European protests?
6. Describe the split-ups of Yugoslavia and Czechoslovakia.
7. In what five countries was communism retained?

Adapted for High School from:

Boundless US and/or World History

source: courses.lumenlearning.com

Fall of the Soviet Union

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Fall of the Berlin Wall

A relaxing of Eastern bloc border defenses initiated a chain of events that pressured the East German government into opening crossing points between East and West Berlin to political refugees, precipitating the eventual **fall of the Berlin Wall**.

In September 1989, more than 13,000 East German tourists escaped through Hungary to Austria. The Hungarians prevented many more East Germans from crossing the border and returned them to Budapest. Those East Germans then flooded the West German embassy and refused to return to East Germany. The East German government responded to this by disallowing any further travel to Hungary but allowed those already there to return to East Germany.

Soon, a similar pattern began to emerge out of Czechoslovakia. This time, however, the East German authorities allowed people to leave, provided that they did so by train through East Germany. This was followed by mass demonstrations within East Germany itself. Protest demonstrations grew considerably by early November, and the movement neared its height on November 4, when half a million people gathered to demand political change at the **Alexanderplatz demonstration** in East Berlin's large public square and transportation hub.



The Alexanderplatz demonstration on 4 November 1989 in East Berlin

Bundesarchiv, Bild 183-1989-1104-437 / Settnik, Bernd / CC BY-SA 3.0

After a series of quick policy changes, the Communist Party executive committee, called the **Politburo**, decided on November 9 to allow refugees to exit directly via crossing points between

East and West Germany, including between East and West Berlin. Later the same day, the ministerial administration modified the proposal to include private, round-trip travel. The new regulations were to take effect the next day.

The Politburo spokesman had the task of announcing the new regulations but had not been involved in the discussions about the new regulations and was not fully updated. Shortly before a press conference on November 9, he was handed a note announcing the changes but given no further instructions on how to handle the information. These regulations had only been completed a few hours earlier and were to take effect the following day to allow time to inform the border guards. But this starting time delay was not communicated to him. At the end of the press conference, he read out loud the note he had been given. One of the reporters asked when the regulations would take effect. After a few seconds' hesitation, the spokesman responded based on assumption that it would be immediate. After further questions from journalists, he confirmed that the regulations included border crossings through the Wall into West Berlin, which he had not mentioned until then.

Excerpts from this press conference were the lead story on West Germany's two main news programs that night, meaning that the news was also broadcast to nearly all of East Germany. East Germans began gathering at the Wall at the six checkpoints between East and West Berlin, demanding that border guards immediately open the gates. The surprised and overwhelmed guards made many hectic telephone calls to their superiors about the problem. At first, they were ordered to find the more aggressive people gathered at the gates and stamp their passports with a special stamp that barred them from returning to East Germany—in effect, revoking their citizenship. However, this still left thousands demanding to be let through.

It soon became clear that no one among the East German authorities would take personal responsibility for issuing orders to use lethal force, so the vastly outnumbered soldiers had no way to hold back the huge crowd of East German citizens. Finally, at 10:45 pm, the commander of one border

crossing yielded, allowing the guards to open the checkpoints and people to pass through with little to no identity checking. As the easterners swarmed through, they were greeted by westerners waiting with flowers and champagne amid wild rejoicing. Soon afterward, a crowd of West Berliners jumped on top of the Wall and were joined by East German youngsters. They danced together to celebrate their new freedom.

Demolition

Television coverage of citizens demolishing sections of the Wall on November 9 was soon followed by the East German regime announcing ten new border crossings. Crowds gathered on both sides of the historic crossings waiting for hours to cheer the bulldozers that tore down portions of the Wall to reinstate ancient roads. While the Wall officially remained guarded at a decreasing intensity, new border crossings continued for some time. Initially the East German military attempted to repair damage done by “Wall peckers,” but gradually these attempts ceased, and guards became more lax, tolerating the demolitions and unauthorized border crossings through holes in the Wall.

West Germans and West Berliners were allowed visa-free travel starting December 23. On June 13, 1990, the East German military officially began dismantling the Wall, and demolition continued throughout the city of Berlin until that December. Various military units dismantled the Berlin/Brandenburg border wall, completing the job in November 1991. Virtually every road that was severed by the Berlin Wall was reconstructed and reopened by August 1, 1990.

The fall of the Wall marked the first critical step towards German reunification, which formally concluded a mere 339 days later on October 3, 1990, with the dissolution of East Germany and the official reunification of the German state along the democratic lines of the West German government.

Collapse of the Soviet Union

The **Revolutions of 1989** culminated a revolutionary wave in the late 1980s and early 1990s that resulted in the end of communist rule in Central and Eastern Europe and beyond.

By the late 1980s, people in the Caucasus and Baltic states were demanding more autonomy from Moscow, and the Kremlin was losing some of its control over certain regions and elements in the Soviet Union. In November 1988, Estonia issued a

declaration of sovereignty, which eventually led to other states doing the same.

The **Chernobyl disaster** in April 1986 had major political and social effects that catalyzed the revolutions of 1989. It is difficult to establish the total economic cost of the catastrophe resulting from an accident involving the No. 4 reactor at the Chernobyl Nuclear Power Plant in Pripyat in northern Ukraine. One political result of the disaster was the greatly increased significance of the Soviet policy of glasnost. Under glasnost, relaxation of censorship resulted in the Communist Party losing its grip on the media, and Soviet citizens were able to learn significantly more about the past and the outside world.

The Soviet media began to expose numerous social and economic problems in the Soviet Union that the government had long denied and covered up, such as poor housing, food shortages, alcoholism, widespread pollution, creeping mortality rates, the second-rate position of women, and the history of state crimes against the population. Although Nikita Khrushchev had denounced Stalin’s personality cult as early as the 1950s, information about the true proportions of his atrocities had still been suppressed. These revelations had a devastating effect on those who believed in state communism and had never been exposed to this information, as the driving vision of society was built on a foundation of falsehood and crimes against humanity. Additionally, information about the higher quality of life in the United States and Western Europe and about Western pop culture were exposed to the Soviet public for the first time.

Political openness continued to produce unintended consequences. In elections to the regional assemblies of the Soviet Union’s constituent republics, nationalists swept the board. As Gorbachev weakened the system of internal political repression, the ability of the USSR’s central government to impose its will on its constituent republics was largely undermined. During the 1980s, calls for greater independence from Moscow’s rule grew louder. This was especially marked in the Baltic Republics of Estonia, Lithuania, and Latvia, which had been annexed into the Soviet Union by Joseph Stalin in 1940. Nationalist sentiment also took hold in other Soviet republics such as Ukraine, Georgia, and Azerbaijan.

Starting in the mid-1980s, the Baltic states used the reforms provided by glasnost to assert their rights to protect their environment and their historic

monuments, and, later, their claims to sovereignty and independence. When the Balts withstood outside threats, they exposed an irresolute Kremlin. Bolstering separatism in other Soviet republics, the Balts triggered multiple challenges to the Soviet Union. The rise of nationalism under glasnost also reawakened simmering ethnic tensions throughout the union.

Collapse: Summer 1989 to Fall 1991

Momentum toward full-blown revolution began in Poland in 1989, in which a powerful non-communist labor union called **Solidarity** demanded concessions from communist leaders. The talks resulted in the Round Table Agreement, by which political power would be vested in a newly created bicameral legislature and a president who would be the chief executive.

A systemic transformation was made possible by the Polish legislative elections of June 4, 1989, which coincided with the bloody crackdown on the Tiananmen Square protesters in China. When polling results were released, a political earthquake erupted: Solidarity's victory surpassed all predictions. Solidarity candidates captured all seats they were allowed to compete for in the legislature's lower house, called the Sejm, while in the newly established Senate they captured 99 out of the 100 available seats (the other seat went to an independent, who later switched to Solidarity). At the same time, many prominent communist candidates failed to gain even the minimum number of votes required to capture the seats that were reserved for them. The communists suffered a catastrophic blow to their legitimacy as a result.

Revolutionary momentum, encouraged by this peaceful transition underway in Poland, continued in Hungary, East Germany, Bulgaria, Czechoslovakia, and Romania. A common feature among these countries was the extensive use of campaigns of civil resistance, demonstrating popular opposition to the continuation of one-party rule and contributing to the pressure for change. Romania was the only Eastern Bloc country whose people overthrew its communist regime violently. After Romanian president **Nicolae Ceausescu** ordered the military to open fire on demonstrators on December 17, 1989, the **Romanian Revolution** followed, in which Ceausescu and his wife were swiftly tried for sabotage and genocide, and then were executed by firing squad on Christmas day.

The Tiananmen Square protests of 1989 failed to

stimulate major political changes in China, but powerful images of courageous defiance during that protest helped to spark a precipitation of events in other parts of the globe.

The Soviet Union was dissolved by the end of 1991, resulting in 14 countries (Armenia, Azerbaijan, Belarus, Estonia, Georgia, Kazakhstan, Kyrgyzstan, Latvia, Lithuania, Moldova, Tajikistan, Turkmenistan, Ukraine, and Uzbekistan) declaring their independence from the Soviet Union in 1990-91. Lithuania had been the first Union Republic to declare independence from the dissolving Soviet Union in 1990. The Lithuanian declaration served as a model and inspiration to other Soviet republics. However, the issue of independence was not immediately settled and recognition by other countries was uncertain.

The rest of the Soviet Union, which constituted the bulk of the area, became Russia in December 1991. Russia elected its first president who was no longer communist, **Boris Yeltsin**, in the same year.

Communism was abandoned in Albania and Yugoslavia between 1990 and 1992. By 1992, Yugoslavia split into the five successor states of Bosnia and Herzegovina, Croatia, Macedonia, Slovenia, and the Federal Republic of Yugoslavia, which was later renamed Serbia and Montenegro and eventually split into two separate states. Serbia then further split, with the breakaway of the partially recognized state of Kosovo. Czechoslovakia was dissolved three years after the end of Communist rule, splitting peacefully into the Czech Republic and Slovakia in 1992. The impact was felt in dozens of socialist countries. Communism was abandoned in countries such as Cambodia, Ethiopia, Mongolia (which democratically reelected a communist government that ran the country until 1996), and South Yemen. The collapse of communism (and of the Soviet Union) led commentators to declare the end of the Cold War.

During the adoption of varying forms of market economies, there was initially a general decline in living standards. Political reforms were varied, but in only five countries were communist parties able to keep for themselves a monopoly on power: China, Cuba, North Korea, Laos, and Vietnam. Many communist and socialist organizations in the West turned their guiding principles over to social democracy. The European political landscape was drastically changed, with numerous Eastern Bloc countries joining NATO and the European Union, resulting in stronger economic and social integration

The Artios Home Companion Series

Unit 28: Advancing Toward a New Millennium

Teacher Overview

THE LAST DECADE of the 20th century was marked with dizzying change. With the Soviet Union out of the picture, American diplomats sought to create a “new world order” based on democracy, free-market capitalism, and the Western lifestyle. Challenges from abroad did not disappear with the end of the Cold War, however. The collapse of the Soviet Union allowed centuries of hatred between rival ethnic groups in Yugoslavia to bubble to the surface. The term “ethnic cleansing” was applied to the process of removing an entire nationality out of a particular territory by threats, violence, or genocide.

Americans began to think of themselves once again as the peacekeepers of the world. The United States contributed blue-helmet peacekeeping troops to Bosnia to end ethnic cleansing and committed air support to Kosovar Albanians who faced the same fate. American troops were also used to provide food to starving civilians in war-torn Somalia, restore a democratically elected president to Haiti, and bomb suspected terrorist bases in Sudan and Afghanistan. Meanwhile, European countries were joining in an unprecedented way to form the European Union, and apartheid was coming to an end in South Africa.

As both political parties in America moved to the center to claim the largest numbers of voters, bitter partisanship emerged. Voters punished the Republicans for economic woes by voting against George Bush in 1992. Then after two years of Bill Clinton, voters punished him by turning the House and the Senate over to the Republicans. A bitter partisan struggle emerged in 1998 over the sex scandals involving Clinton, leading to an impeachment vote largely along party lines. Although disgusted with Clinton’s behavior, voters punished overzealous Republicans by trimming their majority in Congress in 1998.

The 1990s also marked a revolution in communications. Individual use of the Internet mushroomed from a handful of scientists and professors at the beginning of the decade to becoming widespread by the year 2000. Companies re-gearred their methods for online commerce. Electronic mail became a common new form of communication between relatives, friends, and colleagues. Satellite dish networks challenged cable companies for business in telecommunications.



Israeli Prime Minister Yitzhak Rabin, US president Bill Clinton, and PLO chairman Yasser Arafat during the Oslo Accord I meeting (September 13, 1993) Vince Musi / The White House

Suggested Assignments

In this unit, students will:

- Complete four lessons in which they will learn about the **1990s**, including **Bill Clinton’s presidency**, **globalization**, the **creation and structure of the European Union**, and the **repeal of apartheid in South Africa**, journaling and answering discussion questions as they read.
- Write a biographical notebook page on **Nelson Mandela**.
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

God is sovereign over the affairs of men.

And He made from one man every nation of mankind to live on all the face of the earth, having determined allotted periods and the boundaries of their dwelling place.

– Acts 17:26 (review)

Dishonesty is sin and will be punished.

Whoever walks in integrity walks securely, but he who makes his ways crooked will be found out.

– Proverbs 10:9

Lesson One

History Overview and Assignments The Clinton Administration

PRESIDENT CLINTON took office fewer than two years after the fall of the Soviet Union, and the administration's foreign policy addressed conflicts in Somalia, Bosnia and Herzegovina, Kosovo, and Haiti through militarism and economic sanctions. The Clinton administration focused mainly on the economy—specifically on raising taxes on the wealthiest 1.2%, reducing welfare, lowering taxes on low income families, offering tax breaks to small businesses, and promoting free trade. During the Clinton years, the economy experienced its longest economic growth in history. During the last four years of the Clinton administration, the federal budget had surpluses for the first time since 1969. Clinton left office with the highest end of office approval rating of any president since World War II, but he was also the first US president to be impeached since Andrew Johnson.



Despite allegations of smoking marijuana, having extramarital affairs, and dodging the draft, Bill Clinton came out of his 1992 presidential campaign victorious.



Bill Clinton with White House intern Monica Lewinsky
(February 1997)

Clinton White House

<https://clinton.presidentiallibraries.us/items/show/47839>

Suggested Reading and Assignments

- Review the discussion then read the online article: *The Clinton Administration*. The URL for the article can be found on your ArtiosHCS curriculum website. *Note: Read the full webpage for today's lesson.*
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

Bill Clinton	Ross Perot	Josip Broz Tito
“Clintonomics”	Ruby Ridge Siege	Yugoslav War
Alan Greenspan	Waco Siege	Dayton Accords
Omnibus Budget Reconciliation Act of 1993	Oklahoma City bombing	Mohammed Farah Aidid
Personal Responsibility and Work Opportunity Act of 1996	One America Initiative on Race	1994 Genocide in Rwanda
Ratification of NAFTA	Violent Crime Control and Law Enforcement Act of 1994	Jean-Bertrand Aristide
Hillary Rodham Clinton	Federal Assault Weapons Ban	Operation Uphold Democracy
Task Force on National Health Care Reform	“Don’t Ask, Don’t Tell”	Ken Starr
Al Gore	Defense of Marriage Act (DOMA)	Whitewater controversy
Bob Dole	Yitzhak Rabin	Paula Jones
	Yasser Arafat	Monica Lewinsky
	Oslo Accords	William Rehnquist

Discussion Questions

1. Outline Clinton’s governing philosophy.
2. Summarize his economic platform.
3. What did he do that some claim contributed to the 2008 financial crisis?
4. Discuss the main features and debated causes of the “New Economy” of the late 1990s.
5. What was the goal of the Task Force on National Health Care Reform?
6. List arguments made for and against the national health care reform plan proposed by Clinton’s task force.
7. Outline the events of the Waco Siege and the Oklahoma City Bombing.
8. What two settlements did Clinton facilitate in the Middle East?
9. Outline the events of the Yugoslav War and its resolution.
10. What went wrong in Clinton’s attempt to capture a Somali warlord in 1993?
11. For what was Clinton apologetic when he visited Rwanda in 1998?
12. What was done during Operation Uphold Democracy? What was the outcome?
13. Describe the connection between the Whitewater controversy, the Paula Jones lawsuit, and the Monica Lewinsky scandal.
14. Of what specific offenses was Clinton charged in his impeachment proceedings?

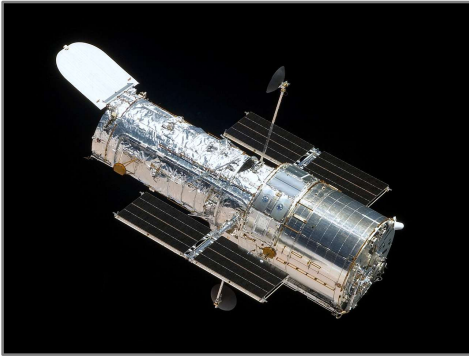
Lesson Two

History Overview and Assignments Globalization

AT ITS MOST BASIC, globalization refers to business activities and the actions of governments spreading to be conducted on a worldwide scale. This has been happening, of course, though at a slower pace, throughout history. The voyages of Zheng He, the European colonial project in the Americas, the Atlantic slave trade, and the activities of the British East India Company in India and China were all conducted on a worldwide scale, and all had commercial elements. As we begin to look at the most recent wave of economic and political globalization, we see sudden acceleration of pace and impact.

Suggested Reading and Assignments

- Review the discussion then read the article: *Neoliberal Globalization*.
- Narrate about today’s reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.



The Hubble Space Telescope as seen from the departing Space Shuttle Atlantis Ruffnax (Crew of STS-125)



The Namban Ship carried Europeans to Japan to trade in the 16th century.
Painted by Kanō Naizen (1570–1616). Source: Kobe City Museum.
Uploaded by Ismoon

Key People, Places, and Events

World Wide Web
“Dot-com bubble”
Dolly (the sheep)
Hubble Space Telescope
Hugo Chávez

Vladimir Putin
World Trade Organization (WTO)
North American Free Trade Agreement (NAFTA)

International Monetary Fund (IMF)
United States–Mexico–Canada Agreement (USMCA)
Deng Xiaoping

Discussion Questions

1. Describe what is meant by “globalization.”
2. What commodity had a major role in the development of the modern global economy?
3. List four characteristics of modern globalization.
4. What is a Russian oligarch, and how did these business magnates gain their political power?
5. Why was NAFTA developed?
6. Trace the rise of Asian economies in the modern era.
7. In what ways was the US instrumental in creating the “Asian Tiger” economies?
8. How did Mao Zedong’s death lead to changes in Chinese economic and trade policy?

Adapted for High School from the book:

Modern World History

source: oercommons.org/courses/modern-world-history

Neoliberal Globalization

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The End of a Millennium

As the second millennium A.D. drew toward a close, a significant shift toward globalism led to a rise in multicultural awareness, interactions, and economics. Mass communication became possible for private individuals by means of the **World Wide Web**, creating new, innovative markets and spurring an atmosphere of increased cynicism toward governments. The “**dot-com bubble**” rise of Internet-related businesses created fast wealth for computer-savvy entrepreneurs, and rapid advancements in technology led to the first mammal clone named **Dolly** the sheep, “designer babies” with selected characteristics, the development of gene therapy for the treatment of disease, and the **Hubble Space Telescope** for capturing extremely high-resolution images in space.

Globalization: Oil

Globalization refers to business activities and the actions of governments branching out on a worldwide scale. As we begin to look at the most recent wave of economic and political globalization, major commodities such as petroleum become prominent. Twentieth-century economic colonialism involving oil was not limited to the Persian Gulf. Before Iran, Iraq, and Saudi Arabia became leading producers, Mexico and Venezuela were heavy suppliers of oil to the US.

Latin America experienced much political and social upheaval after World War II, with socialist military dictatorships seizing power to rule over poverty-stricken countries with single-export economies. Some countries, such as Brazil, have developed industry and more diverse agriculture,

and have seen the rise of a middle class. Others, such as Costa Rica, have built a stable democracy and made economic progress. Oil was a mixed blessing for Venezuela, providing high levels of revenue for the government but also preventing the country's industry from diversifying. In recent decades, Venezuela used its oil revenue to pay for a wide range of social welfare programs for its people. These resulted in temporary improvements in poverty indicators but did not prevent inflation and economic decline under its socialist ruler **Hugo Chávez**.

After increasing during the Arab oil embargo of the 1970s and then peaking during Russia's invasion of Afghanistan in the early 1980s, oil prices languished worldwide in the late 80s, exacerbating the Soviet Union's economic problems. In the early 1990s after the Soviet breakup, Russia began exporting millions of barrels daily into the world market.

Globalization: Post-Cold War

The dissolution of the USSR and the Warsaw Pact accelerated the globalization of commerce. Globalization in this new phase has been characterized by increased foreign investment by transnational corporations, privatization of state enterprises, free movement of capital across national borders, and a reduction of tariffs that impede the movement of products. A wave of deregulation accompanied these changes, as nations competed to attract businesses that were suddenly free to locate themselves anywhere resources, labor, and environmental costs were lowest.

This free movement of capital across national borders was heralded by western commentators as the final, decisive victory of the free market over socialism and communist totalitarianism. In Russia, people who had been members of the political elite were suddenly in position to buy up state-owned assets the government was selling at fire-sale prices. These opportunities were especially lucrative during **Vladimir Putin's** administration, which began in 1999 when Putin became prime minister while Boris Yeltsin was still president. The new prime minister had previously been a KGB counter-intelligence officer in East Germany, who had become director of the FSB (the successor to the KGB) in 1998. Putin's friends and allies did extremely well in the sell-off of Soviet state industries. With the spike in oil prices in the early 2000s these men made vast fortunes and became some of the billionaire **oligarchs** we now

see running the Russian economy for their own benefit. The change to capitalism in Russia did much less than it might have to benefit the general population because the oligarchs captured so much of the profit. The man who captured the most profit seems to have been Vladimir Putin himself. Putin's net worth was estimated at over \$200 billion in assets in 2018, making him among the world's wealthiest people.¹



Putin with President Boris Yeltsin on December 31, 1999, when Yeltsin announced his resignation
Kremlin.ru. CC BY 4.0

Globalization: International Agreements

One of the important forces driving globalization has been the removal of protectionist trade policies around the world. This trend began in 1947 with the General Agreement on Tariffs and Trade (GATT), a free-trade agreement of 23 noncommunist nations. Over time, GATT reduced average tariff levels between member nations from 22% in 1947 to just 5% in 1999. The **World Trade Organization** (WTO) that followed GATT is a more permanent agreement that covers trade in services and intellectual property as well as physical products. The WTO, headquartered in Geneva, has 164 member states including, recently, China. Although the WTO's charter calls on it to "ensure that trade flows as smoothly, predictably, and freely as possible" throughout the world, critics argue it favors rich nations over poor nations; especially in its binding arbitration processes that function like an international trade court, whose decisions take precedence over local or even national court judgments. Global corporations that can deploy teams of lawyers (or even station them permanently in Geneva) to argue in their interest seem to have a disproportionate influence on WTO decisions.

Transnational corporations are uniquely suited to take advantage of this new world economy.

Technically there are about 50,000 global corporations, but the number of corporations that are as important as states in the world economy is a bit smaller.

After negotiations during the Bush years, **North American Free Trade Agreement** (NAFTA) went into effect during the Clinton administration to create a free-trade zone among the three countries of North America (Canada, Mexico, and the United States) and eliminate or reduce tariff barriers that made American exports more expensive in Mexico and Mexican exports more expensive in the US.

The effects of the agreement regarding issues such as employment, the environment, and economic growth have been the subject of political disputes. Most economic analyses indicated that NAFTA was beneficial to the North American economies and the average citizen, but increased unemployment among a minority of workers in industries exposed to trade competition.

NAFTA was replaced in 2020 by the **United States-Mexico-Canada Agreement** (USMCA).



Back row, left to right: Mexican President Carlos Salinas de Gortari, U.S. President George H. W. Bush, and Canadian Prime Minister Brian Mulroney, at the initialing of the draft North American Free Trade Agreement in October 1992

Globalization: Asia

An important element of the shift away from a US-centered globalization is the growing economic power of Asia. Japan's economy was jump-started after WWII by US aid including a \$2 billion direct investment and letting Japan off the hook for war reparations. Japanese goods were also given preferential access to US consumer markets, so the Japanese economy focused on low-wage industries producing products for export to America. The United States no longer considered Japan a threat, but rather as a potential ally against communist China. The Japanese people, already quite accustomed to austerity, complied with their government's new industrial policy and Japan

reinvested its earnings and rapidly developed from a producer of cheap knock-off copies of American products to an innovator in high technology.

Other Asian nations such as Singapore, South Korea, Taiwan, and Hong Kong (which together became known as the "Four Asian Tigers") followed in Japan's footsteps in the 1960s and 70s, often also with aid from the US designed to slow the spread of communism during the Cold War.

After the death of Mao Zedong in 1976, **Deng Xiaoping** gained power in 1978 and China began shifting toward a market economy in which the government would direct development with incentives rather than decrees and directives. In addition to a plentiful supply of cheap labor, China had high savings rates. This, along with Deng's devaluation of the nation's currency, allowed Chinese savings and foreign exchange surpluses to be invested in securities like American government bonds. This made China the world's bank, as nations like the US fell deeper into debt. Finally, a rising standard of living in China has created a new middle class and a huge consumer market.

In 2002, ninety percent of the Chinese population lived in poverty, with seven percent listed as middle class, two percent upper-middle class, and one percent considered affluent by world standards. By 2012, the number of poor in China has been reduced to twenty-nine percent. Two thirds of the poor (nearly a billion people) have improved standards of living, in one of the most momentous shifts in world history. Fifty-four percent of Chinese in 2012 were considered middle class, and that fifty-four percent is expected to rise to upper-middle class status over the decade after that, with another twenty-two percent moving from poverty into the middle class, leaving only sixteen percent of Chinese people in poverty. This is nearly the same income demographic we see in nations like the US, which has a ten percent poverty rate. China is becoming a dominant force in the world economy once again, and the increased spending power of the Chinese people will soon drive the global market. Chinese demand for items like automobiles is expected to outpace the rest of the world for the foreseeable future. Companies like Foxconn, which began as a contract manufacturer of low-tech items like computer cases, has become a nearly \$5 billion manufacturer of the highest tech items like Apple iPhones and computers. Lenovo, which began as a Hong Kong PC clone company in 1984, has been the world's largest personal computer maker since 2013.

Lenovo acquired IBM's PC division in 2005, and the famous IBM ThinkPad became a Chinese product. Lenovo does about \$45 billion in annual revenue and was the world's largest cell-phone maker until 2016 when Apple and Samsung overtook it.

As Chinese purchasing power increases, world industry is will be challenged with producing consumer goods without exhausting finite resources or destroying the environment. Chinese cities have been known for their pollution, especially for their poor air quality. An increasingly affluent population

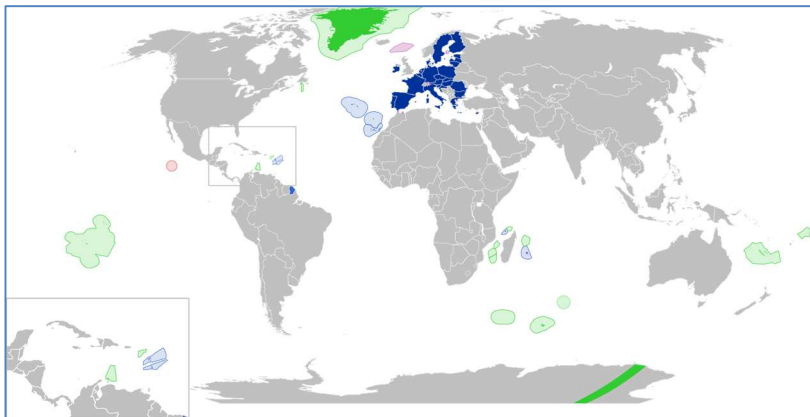
may become less willing to tolerate environmental destruction, which might be a positive change. Hopefully, Chinese interest in projects such as the Belt and Road Initiative, which seeks to connect China with the rest of Asia, Europe, and Africa in a "New Silk Road," will include a commitment to the environments of the places China finds its natural resources and markets for consumer goods, rather than the approach to hinterlands taken by earlier world economic powers, in which out of sight often meant out of mind.

1. "Putin has left almost no paper trail for his assets—mostly property—which are hidden behind complex financial schemes organized by his confidantes, according to a 2016 'Panama Papers' report by the International Consortium of Investigative Journalists. Among the luxuries that have been linked to Putin's friends and family, but never directly to him, are a \$100 million mega-yacht and a Black Sea palace allegedly built for Putin's personal use. On paper, the Russian leader looks like a humble bureaucrat. In 2018, Putin submitted an official income declaration that shows he owns an 800-square-foot apartment in St. Petersburg, along with two Soviet-era cars and an off-road truck. The Kremlin says his annual income is about \$140,000—not an immodest figure in Russia, though hardly one that could keep Putin sporting his rotation of luxury watches. 'Putin's visible watch collection is worth multiples of his official salary,' Bill Browder, an investor in Russia who became a fierce critic of Putin, told CNN in 2018. 'The wealth came as a result of extortion and massive theft from state funds.' Browder testified before the US Senate in 2017 that he estimates the Russian leader's wealth to hover around \$200 billion in assets, which would make him among the wealthiest people on the planet. One theory of Putin's wealth suggests that he has strongarmed Russia's oligarchs, threatening them with arrest or worse unless they fork over cash or stakes in their companies to him." Source – CNN Business: <https://www.cnn.com/2022/02/28/business/vladimir-putin-wealth-sanctions/index.html> (citation: March 15, 2022)

Lesson Three

History Overview and Assignments European Unification

THE EUROPEAN UNION (EU) is a politico-economic union of 27 member states located primarily in Europe. Within a large area of 26 European countries, passport controls have been abolished, and 19 member states use the euro currency.



■ European Union ■ Outermost regions ■ Overseas countries and territories ■ Special cases ■ Other special territories

Key People, Places, and Events

European Union (EU)
Schengen Area
Maastricht Treaty
Helmut Kohl
François Mitterrand
Lisbon Treaty

Suggested Reading and Assignments

- Review the discussion then read the article: *The European Union*.
- Narrate about today's reading using the appropriate notebook page. Be sure to include key people, events, and dates within the narration.
- Instead of answering discussion questions for this lesson, outline the information given in the reading in either number or bullet form.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

The **European Union** (EU) is a politico-economic union of 27 member states located primarily in Europe. It has an area of 4,233,255.3 km² (1,634,469.0 sq mi) and an estimated total population of about 447 million. The EU has developed an internal single market through a standardized system of laws that apply in all member states. EU policies aim to ensure the free movement of people, goods, services, and capital within the internal market, enact legislation in justice and home affairs, and maintain common policies on trade, agriculture, fisheries, and regional development. Within the **Schengen Area**, passport controls have been abolished. A monetary union was established in 1999 and came into full force in 2002 and is composed of 19 EU member states which use the euro currency.

The EU operates through a unique hybrid system of supranational and intergovernmental decision-making. The seven principal decision-making bodies—known as the institutions of the European Union—are the European Council, the Council of the European Union, the European Parliament, the European Commission, the Court of Justice of the European Union, the European Central Bank, and the European Court of Auditors.

The EU traces its origins from the European Coal and Steel Community (ECSC) and the European Economic Community (EEC), formed by the Inner Six countries in 1951 and 1958, respectively. The Community and its successors have grown in size by the accession of new member states and in power by the addition of policy areas to its remit.



The Flag of Europe is the flag and emblem of the European Union (EU) and Council of Europe (CoE).

Maastricht Treaty

The European Union was formally established when the **Maastricht Treaty**—whose main architects were Germany’s chancellor **Helmut Kohl** and France’s president **François**

Mitterrand—came into force on November 1, 1993. The treaty established the three pillars of the European Union: the European Communities pillar, which included the European Community (EC), the ECSC, and the EURATOM; the Common Foreign and Security Policy (CFSP) pillar; and the Justice and Home Affairs (JHA) pillar. The first pillar handled economic, social, and economic policies. The second pillar handled foreign policy and military matters, and the third pillar coordinated member states’ efforts in the fight against crime.

All three pillars were the extensions of existing policy structures. The European Community pillar was a continuation of the EEC. Additionally, coordination in foreign policy had taken place since the 1970s under the European Political Cooperation (EPC), first written into treaties by the Single European Act. While the JHA extended cooperation in law enforcement, criminal justice, asylum, and immigration as well as judicial cooperation in civil matters, some of these areas were already subject to intergovernmental cooperation under the Schengen Implementation Convention of 1990.

The creation of the pillar system was the result of the desire by many member states to extend the EEC to the areas of foreign policy, military, criminal justice, and judicial cooperation. This desire was met with misgivings by some member states, notably the United Kingdom, who thought some areas were too critical to their sovereignty to be managed by a supranational mechanism. The agreed compromise was that instead of completely renaming the European Economic Community as the European Union, the treaty would establish a legally separate European Union comprising the European Economic Community and entities overseeing intergovernmental policy areas such as foreign policy, military, criminal justice, and judicial cooperation. The structure greatly limited the powers of the European Commission, the European Parliament, and the European Court of Justice.

Euro Convergence Criteria

The Maastricht, or convergence, criteria established the minimum requirements for EU member states to enter the third stage of European

Economic and Monetary Union (EMU) and adopt the euro as their currency. The four criteria are defined in article 121 of the treaty establishing the European Community. They impose control over inflation, public debt and the public deficit, exchange rate stability, and the convergence of interest rates. The purpose of this criteria was to maintain price stability within the Eurozone even with the inclusion of new member states.



Logo for the European Council and the Council of the European Union. The logo is inspired by the lantern-shaped structure at the heart of the Europa building, the headquarters of both institutions.

Inflation rates: No more than 1.5 percentage points higher than the average of the three best performing (lowest inflation) member states of the EU.

Annual government deficit: The ratio of the annual government deficit to gross domestic product (GDP) must not exceed 3% at the end of the preceding fiscal year. If not, it must reach a level close to 3%. Only exceptional and temporary excesses would be granted for exceptional cases.

Government debt: The ratio of gross government

debt to GDP must not exceed 60% at the end of the preceding fiscal year. Even if the target cannot be achieved due to specific conditions, the ratio must have sufficiently diminished and be approaching the reference value at a satisfactory pace. As of the end of 2014, of the countries in the Eurozone, only Estonia, Latvia, Lithuania, Slovakia, Luxembourg, and Finland still met this target.

Exchange rate: Applicant countries should have joined the exchange-rate mechanism (ERM II) under the European Monetary System (EMS) for two consecutive years and should not have devalued its currency during the period.

Long-term interest rates: The nominal long-term interest rate must not be more than 2 percentage points higher than in the three lowest-inflation member states.

Lisbon Treaty and Beyond

On December 1, 2009, the **Lisbon Treaty** reformed many aspects of the EU. In particular, it changed the legal structure, merging the three pillars system into a single legal entity provisioned with a legal personality; created a permanent President of the European Council; and strengthened the position of the High Representative of the Union for Foreign Affairs and Security Policy. From the early 2010s, the cohesion of the EU has been tested by several issues, including a debt crisis in some of the Eurozone countries, increasing migration from Africa and Asia, and the United Kingdom's withdrawal from the EU in 2020.

Lesson Four

History Overview and Assignments The Repeal of Apartheid

THE FALL OF THE USSR after 1991 brought an end to funding and changed the attitude of some Western governments that previously supported the South African apartheid regime as an ally against communism. The South African government found itself under increasing internal and external pressure, and this, together with a more conciliatory tone from the African National Congress, resulted in a change in the political landscape. State President F.W. de Klerk unbanned the ANC and other banned organizations on February 2, 1990, and began peace talks for a negotiated settlement to end apartheid.

Suggested Reading and Assignments

- Review the discussion then read the article: *Apartheid Repealed*.
- Narrate about today's reading using the appropriate notebook page. Be sure to include key people, events, and dates within the narration.

- Instead of answering discussion questions for this lesson, outline the steps toward South Africa’s repeal of apartheid in either number or bullet form.
- Write a biographical notebook page on **Nelson Mandela**.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.



The new multicolored flag of South Africa adopted in 1994 to mark the end of Apartheid
 Flag design by Frederick Brownell, image by Wikimedia Commons users - Per specifications in the Constitution of South Africa, Schedule 1
 - National flag



President F.W. de Klerk and Nelson Mandela at the Annual Meeting of the World Economic Forum held in Davos (1992)

Copyright World Economic Forum (www.weforum.org) - Frederik de Klerk & Nelson Mandela - World Economic Forum Annual Meeting Davos, 1992. CC BY-SA 2.0

Key People, Places, and Events

African National Congress	Oliver Tambo	Convention For a Democratic South Africa (CODESA)
MK	F.W. de Klerk	Desmond Tutu
Nelson Mandela	Afrikaner	

Adapted for High School from:
Boundless World History
 source: courses.lumenlearning.com
Apartheid Repealed
 CC BY-SA: Attribution-ShareAlike

The African National Congress

Following the Sharpeville massacre in 1960, the **African National Congress** (ANC) political party’s leadership concluded that methods of non-violence, such as those utilized by Mohandas Gandhi against the British Empire, were not sufficient against the apartheid system. A military wing was formed in 1961, called *Umkhonto we Sizwe* (MK), meaning “Spear of the Nation,” with **Nelson Mandela** as its first leader. MK operations during the 1960s primarily involved targeting and sabotaging government facilities.

Mandela was arrested in 1962, convicted of sabotage in 1964, and sentenced to life imprisonment, along with other ANC leaders later, on Robben Island. During the 1970s and 1980s, the ANC leadership in exile under **Oliver Tambo**

targeted apartheid government leadership, command and control, secret police, and military-industrial complex assets and personnel in decapitation strikes, targeted killings, and guerrilla actions such as bomb explosions in facilities frequented by military and government personnel. A number of civilians were also killed in these attacks.

The ANC was classified as a terrorist organization by the South African government and some Western countries, including the US and UK. As the years progressed, ANC attacks, coupled with international pressure and internal dissent, increased in South Africa. The ANC received financial and tactical support from the USSR, which orchestrated military involvement with surrogate Cuban forces via Angola. However, the fall of the USSR after 1991 brought an end to funding and

changed the attitude of some Western governments that had previously supported the apartheid regime as an ally against communism. The South African government found itself under increasing internal and external pressure, and this, together with a more conciliatory tone from the ANC, resulted in a change in the political landscape. State President **F.W. de Klerk** began peace talks in 1990 for a negotiated settlement to end apartheid.



Sign designating the use of amenities and installations for exclusive use of white people, during Apartheid in South Africa, written in English and Afrikaans

Dewet - Derived from Aprt.jpg on en.wiki, perspective and lighting corrected somewhat

Nelson Mandela

The imprisoned Nelson Mandela was a central figure in the negotiation process that led to South Africa's transition from apartheid minority rule to a multicultural democracy. The first meetings between the South African government and Mandela were secret meetings, designed to understand whether there was sufficient common ground for future peace talks. As these meetings evolved, a level of trust developed between the key actors—Niël Barnard (head of South Africa's National Intelligence Service), his deputy, and Mandela. To facilitate future talks while preserving secrecy needed to protect the process, Barnard arranged for Mandela to be moved to a prison in Cape Town that provided him with more comfortable lodgings, but also gave easier access in a way that could not be compromised. Barnard therefore brokered an initial agreement in principle about what became known as "talks about talks." It was at this stage that the process was elevated from a secret engagement to a more public engagement.

Unbanning and Mandela's Release: 1990-91

When F.W. de Klerk became president in 1989, he built on the previous secret negotiations with the imprisoned Mandela. The first significant steps towards formal negotiations took place in February

1990 when in his speech at the opening of Parliament, de Klerk announced the unbanning of the ANC and other banned organizations and the release of ANC leader Nelson Mandela after 27 years in prison. Mandela proceeded on an African tour, meeting supporters and politicians in Zambia, Zimbabwe, Namibia, Libya, and Algeria. Then he continued to Sweden, where he was reunited with exiled ANC leader Oliver Tambo, and London, where he appeared at a tribute concert in his honor in Wembley Park. In France, Mandela was welcomed by President François Mitterrand; in Vatican City by Pope John Paul II; and in the United Kingdom by Prime Minister Margaret Thatcher. In the United States, he met President George H.W. Bush, addressed both Houses of Congress, and visited eight cities, finding particular popularity among the African American community. In Cuba, he became friends with President Fidel Castro, whom he had long admired. He met the leaders of India, Indonesia, Malaysia, and Australia. He visited Japan, but not the USSR, a longtime ANC supporter. All the while, Mandela encouraged foreign countries to support sanctions against the apartheid government.



Nelson Mandela
White House Photograph Office

In May 1990, Mandela led a multiracial ANC delegation into preliminary negotiations with a government delegation of 11 Afrikaner men (Afrikaners are descended predominantly from Dutch settlers and dominated South Africa's politics prior to 1994). Mandela impressed them with his discussions of Afrikaner history, and the negotiations led to the Groot Schuur Minute, a

commitment between the two parties toward negotiation, in which the government lifted the state of emergency. In August, Mandela—recognizing the ANC’s severe military disadvantage—offered a ceasefire, the Pretoria Minute, for which MK activists widely criticized him. He spent much time trying to unify and build the ANC, appearing at a Johannesburg conference in December attended by 1,600 delegates, many of whom found him more moderate than expected.

Apartheid legislation was repealed on 17 June 1991. At the ANC’s July national conference in Durban, Mandela admitted the party’s faults and announced his aim to build a “strong and well-oiled task force” for securing majority rule. At the conference, he was elected ANC president, replacing the ailing Tambo, and a 50-strong multiracial, mixed-gendered national executive was elected.

Mandela was given an office in the newly purchased ANC headquarters at Shell House, Johannesburg, and moved into his wife Winnie Madikizela’s house in Soweto. Their marriage was increasingly strained as he learned of her affair with another activist, but he supported her during her trial for kidnapping and assault. He gained funding for her defense from the International Defence and Aid Fund for Southern Africa and from Libyan leader Muammar Gaddafi. However, in June 1991, she was found guilty and sentenced to six years in prison, reduced to two on appeal. On April 13, 1992, Mandela publicly announced his separation from Winnie. The ANC forced her to step down from the national executive for misappropriating ANC funds and Mandela moved into the mostly white Johannesburg suburb of Houghton.

Mandela’s prospects for a peaceful transition were further damaged by an increase in “black-on-black” violence, particularly between ANC and Inkatha supporters, which resulted in thousands of deaths. Mandela met with Inkatha leader Buthelezi, but the ANC prevented further negotiations on the issue. Mandela argued that there was a “third force” within the state intelligence services, fueling the violence. Mandela openly blamed de Klerk—whom he increasingly distrusted—for a massacre in Sebokeng. In September 1991, a national peace conference was held in Johannesburg at which Mandela, Buthelezi, and de Klerk signed a peace accord, though the violence continued.

CODESA Talks: 1991-92

The Convention For a Democratic South

Africa (CODESA) began in December 1991 at the Johannesburg World Trade Center, attended by 228 delegates from 19 political parties. Although someone else led the ANC’s delegation, Mandela remained a key figure, and after de Klerk used the closing speech to condemn the ANC’s violence, Mandela denounced de Klerk as the “head of an illegitimate, discredited minority regime.” Dominated by the National Party and ANC, little negotiation was achieved.

At CODESA 2 in May 1992, de Klerk insisted that post-apartheid South Africa must use a federal system with a rotating presidency to ensure the protection of ethnic minorities. Mandela opposed this, demanding a unitary system governed by majority rule. Following a massacre of ANC activists by government-aided Inkatha militants, Mandela called off the negotiations before attending a meeting of the Organisation of African Unity in Senegal, at which he called for a special session of the UN Security Council and proposed that a UN peacekeeping force be stationed in South Africa to prevent state terrorism. Calling for domestic mass action, in August the ANC organized the largest-ever strike in South African history, and supporters marched on Pretoria.

Following a massacre in Bisho, in which 28 ANC supporters and one soldier were shot dead by the Ciskei Defence Force during a protest march, Mandela realized that mass action was leading to further violence, and he resumed negotiations in September. He agreed to do so on the conditions that all political prisoners be released, Zulu traditional weapons be banned, and Zulu hostels fenced off. The latter two measures were intended to prevent further Inkatha attacks. De Klerk reluctantly agreed to these terms. The negotiations agreed that a multiracial general election would be held, resulting in a five-year coalition government of national unity and a constitutional assembly that gave the National Party continuing influence. The ANC also conceded to safeguarding the jobs of white civil servants. Such concessions brought fierce internal criticism. The duo also agreed on an interim constitution based on a liberal democratic model, guaranteeing separation of powers, creating a constitutional court, and including a US-style bill of rights. The constitution also divided the country into nine provinces, each with its own premier and civil service, a compromise between de Klerk’s desire for federalism and Mandela’s desire for a unitary South African government.

The democratic process was threatened by the Concerned South Africans Group (COSAG), an alliance of far-right Afrikaner parties and black ethnic-secessionist groups like the Inkatha. In June 1993, the white supremacist Afrikaner Weerstandsbeweging (AWB) attacked the Kempton Park World Trade Center. Following the murder of ANC activist Chris Hani, Mandela gave a speech to calm rioting soon after appearing at a mass funeral in Soweto for Tambo, who had died of a stroke. In July 1993, both Mandela and de Klerk visited the US, independently meeting with President Bill Clinton and each receiving the Liberty Medal. Soon after, Mandela and de Klerk were jointly awarded the Nobel Peace Prize in Norway. Influenced by ANC diplomat Thabo Mbeki, Mandela began meeting with big business figures and played down his support for nationalization, fearing that he would scare away much needed foreign investment. Although criticized by socialist ANC members, he had been encouraged to embrace private enterprise by members of the Chinese and Vietnamese Communist parties at the January 1992 World Economic Forum in Switzerland.

General Election: 1994

With the election set for April 27, 1994, the ANC began campaigning, opening 100 election offices and orchestrating People's Forums across the country at which Mandela could appear. The ANC campaigned on a reconstruction and development program to build a million houses in five years, introduce universal free education, and extend access to water and electricity. The party's slogan was "a better life for all," although it was not explained how this development would be funded. With the exception of the Weekly Mail and the New Nation, South Africa's press opposed Mandela's election, fearing continued ethnic strife. Mandela devoted much time to fundraising for the ANC, touring North America, Europe, and Asia to meet wealthy donors, including former supporters of the apartheid regime. He also urged a reduction in the voting age from 18 to 14, which was ultimately rejected by the ANC.

Concerned that COSAG would undermine the election, particularly in the wake of violent incidents involving the AWB and Inkatha, Mandela met with Afrikaner politicians and generals, persuading many to work within the democratic system. He also convinced Inkatha's Buthelezi to enter the elections rather than launch a war of secession. As leaders of the two major parties, de Klerk and Mandela

appeared on a televised debate. Although de Klerk was widely considered the better speaker at the event, Mandela's offer to shake his hand surprised him, leading some commentators to deem it a victory for Mandela. The election went ahead with little violence, although an AWB cell killed 20 with car bombs. As widely expected, the ANC won a sweeping victory, taking 63% of the vote, just short of the two-thirds majority needed to unilaterally change the constitution.

Presidency of Nelson Mandela

The newly elected National Assembly's first act was to formally elect Mandela as South Africa's first non-white chief executive. His inauguration took place in Pretoria on May 10, 1994, televised to a billion viewers globally. The event was attended by 4,000 guests, including world leaders from a wide range of geographic and ideological backgrounds. Mandela headed a Government of National Unity (a broad coalition government consisting of all major parties but dominated by the ANC)—which had no experience of governing by itself—but containing representatives from the National Party and Inkatha. Under the interim constitution, Inkatha and the National Party were entitled to seats in the government by virtue of winning at least 20 seats in the election. In keeping with earlier agreements, both de Klerk and Thabo Mbeki were given the position of deputy president. Although Mbeki had not been his first choice for the job, Mandela grew to rely heavily on him throughout his presidency, allowing him to shape policy details. Although he dismantled press censorship and spoke out in favor of freedom of the press, Mandela was critical of much of the country's media, noting that it was overwhelmingly owned and run by middle-class whites and believing that it focused too heavily on scaremongering about crime.

National Reconciliation

Presiding over the transition from apartheid minority rule to a multicultural democracy, Mandela saw national reconciliation as the primary task of his presidency. Having seen other post-colonial African economies damaged by the departure of white elites, Mandela worked to reassure South Africa's white population that they were protected and represented in "the Rainbow Nation." Although his National Unity government would be dominated by the ANC, he attempted to create a broad coalition by appointing de Klerk as deputy president and other

National Party officials as ministers for Agriculture, Energy, Environment, and Minerals and Energy, as well as naming Buthelezi as minister for Home Affairs. The other cabinet positions were taken by ANC members, many of whom had long been comrades. Mandela's relationship with de Klerk was strained because he believed de Klerk was intentionally provocative. Likewise, de Klerk felt that he was being intentionally humiliated by the President. In January 1995, Mandela heavily chastised him for awarding amnesty to 3,500 police officers just before the election, and later criticized him for defending former Minister of Defence Magnus Malan when the latter was charged with murder.

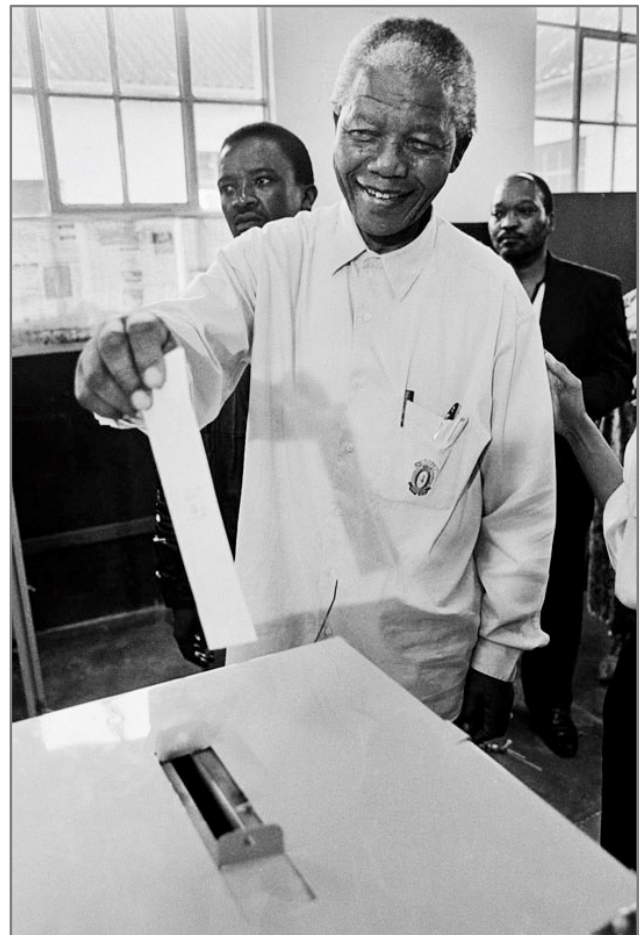
Mandela personally met with senior figures of the apartheid regime. He also laid a wreath by the statue of Afrikaner hero Daniel Theron. Emphasizing personal forgiveness and reconciliation, Mandela announced that "courageous people do not fear forgiving, for the sake of peace." He encouraged non-white South Africans to get behind the previously hated national rugby team, the Springboks, as South Africa hosted the 1995 Rugby World Cup. Mandela wore a Springbok shirt at the final against New Zealand, and after the Springboks won the match, Mandela presented the trophy to team captain Francois Pienaar, an Afrikaner. This was widely seen as a major step in the reconciliation of South Africans of different ethnicities. Mandela's efforts at reconciliation assuaged the fears of whites, but also drew criticism from more militant non-whites. Among the latter was his estranged wife, Winnie, who accused the ANC of being more interested in appeasing the white community than in helping the non-white majority.



Archbishop Desmond Tutu
Photo by Benny Gool

Mandela oversaw the formation of a Truth and Reconciliation Commission to investigate crimes committed under apartheid by both the government and the ANC, appointing nonviolence advocate Archbishop **Desmond Tutu** as its chair.

To prevent the creation of martyrs, the Commission granted individual amnesties in exchange for testimony of crimes committed during the apartheid era. Dedicated in February 1996, it held two years of hearings detailing rapes, torture, bombings, and assassinations before issuing its final report in October 1998. Both de Klerk and Mbeki appealed to have parts of the report suppressed, though only de Klerk's appeal was successful. Mandela praised the Commission's work, stating that it "had helped us move away from the past to concentrate on the present and the future."



Official photo of Nelson Mandela casting his vote in South Africa's 1994 elections. This was the first time Mandela had voted in his life. It was taken at Ohlange School, Inanda, Durban by the Electoral Commission of South Africa's official photographer, Paul Weinberg. It is one of only two images of this event.

Paul Weinberg - direct donation from Author 14 October 2009, 19:07:42
(original upload date), CC BY-SA 3.0

The Artios Home Companion Series

Unit 29: The New Millennium Begins

Teacher Overview

AMERICA LOOKED to the new millennium with bright optimism, with a growing economy promising greater prosperity and little interference from foreign affairs to affect the daily lives of most Americans. A dreaded, worldwide computer-based threat known as Y2K never materialized when the clocks rolled to January 1 in the year 2000, and the world released a collective breath of relief.

The 2000 presidential campaign stirred controversy when the close race between George W. Bush and Al Gore was stalled by disputed vote counts in Florida and the Supreme Court ruled in favor of Bush. During this time, the economy experienced a downturn when the “dot.com” industry lost value, giving indication of deeper economic woes, which indeed developed into a recession.

Throughout Western Europe, conservatism was regaining some of the popularity it had enjoyed during the time following the Cold War. Although Tony Blair and his “New Labour Party” defeated the conservatives in Great Britain in 1997, Blair maintained centrist policies to preserve public support. France and Germany followed a similar pattern, with socialist-leaning leaders turning to conservative methods to address economic difficulties.

In Eastern Europe, however, newly elected Vladimir Putin instituted undemocratic policies in pursuit of greater centralized control. In response, Bush initiated substantial changes in US relations with Russia. In Asia, he expressed regret after a US surveillance aircraft collided with a Chinese fighter jet, which sparked an international dispute when the US spy plane was forced to make an emergency landing on the Chinese island of Hainan. China is the only major nation that remained communist into the new millennium, although North Korea and Cuba continue to maintain totalitarian governments.

Hostilities in the Middle East also deepened during this time. Iran, an old ally of the US, was now ruled by an Islamic republic set in place by Islamic radicals after overthrowing the shah in 1979. Taliban terrorist forces had gained control of Afghanistan, instituted radical Islamist rule, and committed acts of terrorism against secular Muslim governments. Al-Qaeda, led by wealthy Saudi Osama bin Laden, carried even more hatred toward nations considered to be “enemies of Islam” and launched more sinister attacks. Although bin Laden’s initial target was Saudi Arabia, the network increasingly set its sights on the US because of its support of Israel and for interfering in the Gulf War.

Americans remained generally unconcerned by these developments until a few hours after dawn on the morning of September 11, 2001.



New York, NY, September 19, 2001: Rescue workers climb over and dig through piles of rubble from the destroyed World Trade Center as the American flag billows over the debris.

Photo by Andrea Booher/ FEMA News Photo

Suggested Assignments

In this unit, students will:

- Complete four lessons in which they will learn about **America in the early years of the 21st century**, journaling and answering discussion questions as they read.
- Make a chart on a piece of paper with two columns. In one column, list the **legislation, issues, and events** listed in the article that took place during the **Bush administration**. In the other column, describe each piece of legislation, issue, or event in as much detail as possible.
- Make a chart on a piece of paper with two columns. In one column, list the **legislation, issues, and events** listed in the article that occurred during the **Obama administration**. In the other column, describe each piece of legislation, issue, or event in as much detail as possible.
- Visit the **ArtiosHCS** curriculum website at www.ArtiosHCS.com for additional resources and any videos and websites assigned for this unit.

Leading Ideas

God is sovereign over the affairs of men.

And He made from one man every nation of mankind to live on all the face of the earth, having determined allotted periods and the boundaries of their dwelling place.

– Acts 17:26 (review)

Dishonesty is sin and will be punished.

Whoever walks in integrity walks securely, but he who makes his ways crooked will be found out.

– Proverbs 10:9

Lesson One

History Overview and Assignments A New Leader For a New Millennium

IN THE DISPUTED and extremely close 2000 election, Al Gore, who was Clinton's Democratic vice president, ran against George W. Bush, the Republican Governor of Texas and son of former president George H.W. Bush. The election was noteworthy for a controversy over the awarding of Florida's 25 electoral votes, the subsequent recount process in that state, and the unusual event of the winning candidate having received fewer popular votes than the runner-up.



President George W. Bush

Official White House photo by Eric Draper (January 14, 2003)

Key People, Places, and Events

Y2K
Al Gore
George W. Bush
Partial-Birth Abortion Ban Act of 2003
Mexico City Policy
Hainan Island Incident

Discussion Questions

1. Outline the events of the 2000 presidential election.
2. Summarize the argument of supply-side economics.
3. What do critics argue?

Suggested Reading and Assignments

- Review the discussion questions then read the article: *The George W. Bush Administration*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Adapted for High School from:
Boundless US History
source: courses.lumenlearning.com
The George W. Bush Administration
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When the clocks rolled to January 1 in the year 2000, a dreaded, worldwide computer-based threat known as Y2K was anticipated, threatening to shut down computers and electrical systems everywhere for the simple reason that computers built in the early days of electronic computing had been programmed with dates only through 1999, and no one really knew the extent to which modern computer systems might be dependent on some of the older ones. Despite great concern, the threat never materialized. The world released a collective breath of relief, and the US moved on to the business of selecting a new president.



The logo created by the President's Council on the Year 2000 Conversion, for use on Y2K.gov

The Election of George W. Bush

Although the 2000 presidential campaign focused mainly on domestic issues—such as the projected budget surplus, proposed reforms of Social Security and Medicare, health care, and competing plans for tax relief—foreign policy was often an issue. Bush criticized the Clinton administration's policies regarding Somalia and the Balkans. His opponent **Al Gore**, meanwhile, questioned Bush's fitness for the job, pointing to gaffes made by Bush in interviews and speeches, and suggesting the Texas governor lacked the necessary experience to be president.

Bill Clinton's impeachment cast a shadow on the Democratic campaign and on his vice president's run to replace him, and Gore and his running mate Joe Lieberman studiously avoided the Clinton scandals. Ralph Nader was the most successful third-party candidate, drawing 2.74 percent of the popular vote. Many Gore supporters claimed Nader split the Democratic vote, tipping the election for Bush.

The general election of 2000 was highly

contested. After two vote recounts, Democratic presidential candidate and incumbent Vice President Al Gore filed a lawsuit for a third recount. The Supreme Court's controversial decision in *Bush v. Gore* resolved the dispute. The Florida Secretary of State certified Bush as the winner of Florida, and Florida's 25 electoral votes gave Bush, the Republican candidate, 271 electoral votes, enough to defeat Al Gore. Later research showed that by the standards requested by the Gore campaign, Bush would have won the recount. However, had the Gore campaign asked for a full statewide recount, the same research indicates that Gore would have probably won the recount by about 100 votes, consequently giving him Florida's electoral votes and victory in the presidential election.



Bush being sworn in as president, January 20, 2001
Wally McNamee - Whitehouse.gov, A Look Back: 2001 Inauguration

George W. Bush's Administration Republican: 2001-2009

The presidency of **George W. Bush** began on January 20, 2001, when he was inaugurated as the

43rd President of the United States. The oldest son of former president George H.W. Bush, George W. Bush became the second US president whose father had held the same office (John Quincy Adams was the first).

Bush had campaigned with a promise of “compassionate conservatism” at home and non-intervention abroad. These platform promises were designed to appeal to those who felt that the Clinton administration’s initiatives in the Balkans and Africa had unnecessarily entangled the United States in the conflicts of foreign nations.

The guiding political philosophy of the Bush administration has been termed neoconservatism. By the time Bush became president, the concept of supply-side economics had become an article of faith within the Republican Party. The argument is that lowering taxes, decreasing regulation, and encouraging free trade allows business leaders to invest more and create jobs. Consumers then demand larger supplies of goods and services, which lowers prices, and employment should thus increase. Critics point out that supply-side economics widens the gap between the rich and the poor, and that reducing the federal income tax rate has not historically resulted in higher tax revenues over the following years.

Bush advocated that the US-globalized military should be enlarged, equipped, and restructured for the “constabulary” roles associated with shaping the security in critical regions of the world.

When Bush took office in January 2001, he was committed to a Republican agenda. He tried to limit the role of government in people’s lives, in part by providing students with vouchers to attend charter and private schools, and by encouraging religious organizations to provide social services instead of the government. He pushed through a \$1.3 trillion tax cut program and passed an educational reform act that supported standards-based education reform based on the premise that setting high standards and establishing measurable goals could improve individual outcomes in education.

Critics charge the tax relief gave most benefit to the wealthiest Americans, that many of his supply-side economic reforms stalled during his second term, and that the tax cuts arguably pushed the United States into a chronically large federal deficit.

Bush succeeded in pushing through socially conservative initiatives, such as the **Partial-Birth Abortion Ban Act of 2003** and faith-based welfare initiatives. He also reinstated the **Mexico**

City Policy, requiring any non-governmental organization receiving US government funding to refrain from performing or promoting abortion services in other countries.



President George W. Bush signing the Economic Growth and Tax Relief Reconciliation Act of 2001 in the White House East Room on June 7, 2001

Hainan Island Incident

In international relations, Bush faced a tense situation when on April 1, 2001, a United States Navy intelligence aircraft and a Chinese Navy interceptor fighter jet collided in mid-air, resulting in an international dispute between the United States of America and the People’s Republic of China.

The US EP-3 aircraft was flying about 70 miles away from the Chinese island province of Hainan when two Chinese J-8 fighters intercepted it. A collision between the EP-3 and one of the J-8s caused the death of a Chinese pilot, and the EP-3 had to make an emergency landing on Hainan. The twenty-four American crew members were detained and interrogated by the Chinese authorities until a statement was delivered by the US government regarding the Hainan Island Incident. The phrasing of this document was intentionally vague, allowing both superpowers to save face while defusing a potentially volatile situation between them.

Lesson Two

History Overview and Assignments The September 11 Attacks and the War on Terror

ON SEPTEMBER 11, 2001, in a simple set of maneuvers, al-Qaeda terrorists traumatized the US like no other single event since Pearl Harbor. No one who lived during that time will ever forget the images of onlookers crying out in horror when each of the Twin Towers finally collapsed to the ground. In the worst attack in history on American soil, radical Islamist terrorists had deliberately targeted civilians at locations symbolizing American wealth and power.



The north face of Two World Trade Center (South Tower) immediately after being struck by United Airlines Flight 175

Robert on Flickr. This cropped version has been extracted from another file: UA Flight 175 hits WTC south tower 9-11 edit.jpeg.



Ground Zero, New York City, NY (Sept. 17, 2001): An aerial view shows only a small portion of the crime scene where the World Trade Center collapsed following the Sept. 11 terrorist attack. Surrounding buildings were heavily damaged by the debris and massive force of the falling twin towers. Clean-up efforts continued for months.

US Navy photo by Chief Photographer's Mate Eric J. Tilford

Suggested Reading and Assignments

- Review the discussion questions then read the article: *September 11 and the War on Terror*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

World Trade Center

Al-Qaeda

Osama bin Laden

George W. Bush

Taliban

War in Afghanistan

Khalid Sheikh Mohammed

Mohammed Atef

Department of Homeland Security

Patriot Act

Saddam Hussein

Kurds

Sunni Muslim Arabs

Shi'a Muslim Arabs

British Mandate of Mesopotamia

Faisal I of Iraq

Hashemite Kingdom of Iraq

14 July Revolution

Arab Socialist Ba'ath Party

17 July Revolution

Ahmed Hassan al-Bakr

Operation Iraqi Freedom

Iraq War

Global War on Terrorism

Operation Red Dawn

David Petraeus

Discussion Questions

1. Outline the events of the morning of September 11, 2001.
2. What kind of organization is al-Qaeda?
3. How did President Bush and the United States respond to the terrorist attack? Be specific.
4. Why was the Department of Homeland Security created, and what was its role?
5. Why were there objections to the passing of the Patriot Act?
6. Outline Iraq's history and Saddam Hussein's rise to power.
7. What similarities can be seen between Saddam's rise and rule and those of Adolf Hitler?
8. Why did President Bush attack Iraq and its leader, Saddam Hussein?
9. What type of tactics did the forces of Saddam Hussein use against the allies?
10. Why did US support for the war begin to weaken?
11. Describe the fate of Saddam Hussein.

September 11 and the War on Terror

by Mary E. Hall

On September 11, 2001, Americans started their day like any other Tuesday, caring for their families and heading to work. At 8:46 am, their feeling of security was shattered forever when American Airlines Flight 11, with a crew of 11 and 76 passengers, crashed into the North Tower of the **World Trade Center** in New York City. Suppositions of pilot error or equipment failure were dashed eighteen minutes later when United Airlines Flight 175, with a crew of 9 and 51 passengers, barreled into the South Tower.

The impact of these collisions, coupled with the explosions of the airliners' fuel tanks, destroyed the Twin Towers, killing nearly 3000 people in a single attack.

Thirty-four minutes later, American Airlines Flight 77, bound for Los Angeles from Dulles Airport in Virginia, slammed into the Pentagon in Washington, DC. Then at 10:03 am, United Airlines Flight 93 crashed in a field in Pennsylvania, thwarted by passengers from reaching its hijackers' intended target—likely the White House or the Capitol Building.

In a simple set of maneuvers, members of an extremist multinational Sunni Islamic terrorist network called **al-Qaeda** traumatized the nation like no other single event since Pearl Harbor. Aircraft throughout the nation were grounded and all flights were cancelled, creating an eerie silence that lasted for days while Americans huddled around news broadcasts showing victims leaping to their deaths from upper floors of blazing skyscrapers and rescue personnel doing everything they could to assist survivors. No one who lived during that time will ever forget the images of onlookers crying out in

horror when each of the Twin Towers finally collapsed to the ground.



Dust-covered survivors after the collapse of the World Trade Center towers
Photo by Don Halasy

Americans responded with a surge of patriotism, flying American flags on homes and cars while contributing generously of their time and money to aid victims of the attacks. "God Bless America" was sung for months at baseball games and across the airwaves. A spirit of national repentance spread throughout the land as millions flocked to churches seeking God's mercy and protection.

In the worst attack in history on American soil, radical Islamist terrorists had deliberately targeted civilians at locations symbolizing American wealth and power. While nations around the world offered sympathy and support, radical jihadists in Mideast nations celebrated in the streets. *Jihad*, an Arabic term for "a struggle for a noble cause," has come to mean "holy war against infidels" in reference to terrorist attacks by Islamist radicals.

When the hijackers were identified as al-Qaeda terrorists led by **Osama bin Laden**, President **George W. Bush** declared a war on terror, teaming the American military with other Allied forces to bring to justice those responsible for the attacks and launch a global assault against all forms of terrorism. With tremendous public support, this multinational coalition struck at the militant Islamist **Taliban** regime, which ruled most of Afghanistan at that time and harbors al-Qaeda, using “smart weapons” to minimize civilian casualties while destroying al-Qaeda terrorist training camps. The ensuing **War in Afghanistan** would continue for twenty years—longer than both world wars and the Vietnam War combined—becoming America’s longest war fought on foreign soil.

With help from local anti-Taliban forces, the Taliban government was ousted for a time in December, and Afghanistan began to rebuild itself as a nation. A number of September 11 instigators, such as **Khalid Sheikh Mohammed** and **Mohammed Atef**, were either killed or captured during these operations.



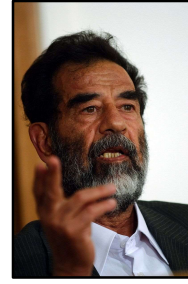
Khalid Sheikh Mohammed, the principle architect of the September 11 attacks, after his capture in Pakistan in 2003

Osama bin Laden was not caught, however, until Navy Seals raided his compound in Pakistan and shot him down in 2011.

In the US, the Bush administration created the office that later became the US **Department of Homeland Security** and encouraged passage of the **Patriot Act** to facilitate the capture and conviction of terrorists. While congressional support for the act was overwhelming, many Americans decried the law’s infringement upon privacy rights. Certain provisions were later declared unconstitutional by the Supreme Court.

Bush continued to deploy military forces to root out terrorist organizations, striking before they could launch additional attacks. Iraqi dictator **Saddam Hussein**, who continued to threaten peace and was rumored to have developed biological and chemical

weapons of mass destruction, was one of his primary targets.



Saddam Hussein (2004)

A Brief History of Iraq

One of the earliest centers of human civilizations and empires, the land that was once known as Mesopotamia (“between the rivers”) has a long and complex history. After giving rise in ancient days to the Sumerian, Assyrian, and Babylonian cultures, the region fell under Persian, then Greek, then Roman control until the Muslims invaded in the 7th century, and Baghdad became the Abbasid Caliphate’s capital.

During Islam’s Golden Age, the city developed into a major cultural and intellectual center, renowned for its academic institutions, discoveries, and inventions. After the Mongol Siege of Baghdad in 1258, the culture experienced lengthy decline until the Ottoman Turks conquered the full stretch of land between southeast Africa and the Balkans during the 16th century.

*The Ottomans split Mesopotamia into three separate states, which in Iraq today are peopled predominantly by **Kurds** in the north, **Sunni Muslim Arabs** (Sunnis) in the central portion, and **Shi’a Muslim Arabs** (Shiites) in the south. The Ottomans allowed traditional tribal family groups to maintain their rule, so little development took place over the years until Allied forces attacked the region during World War I and defeated the Ottomans, and Iraq came under British occupation.*

*The **British Mandate of Mesopotamia**, under the authority of the League of Nations, joined the three sections together to form a kingdom under **Faisal I of Iraq**. This **Hashemite Kingdom of Iraq**, though united, was ridden with internal strife, as the Kurds sought independence while the Sunnis and Shiites battled each other for dominance. The British, with interests in Iraq’s oil production, kept the kingdom dependent upon British military assistance.*

*The kingdom gained independence from Britain by treaty in 1932 but was overthrown in 1958 in the **14 July Revolution**, at which time the*

Iraqi Republic was formed. The **Arab Socialist Ba'ath Party** then came to power in 1968 after a bloodless coup called the **17 July Revolution**. Saddam Hussein, then a high-ranking party official, made great improvements to Iraq's infrastructure, education, and welfare systems, modernizing the economy while seizing control of international oil holdings in the country. After the 1973 energy crisis, skyrocketing increases in oil revenues fueled his economic reforms, greatly expanding the country's industrial capabilities and raising the standard of living, which won him enthusiastic public support.

In 1972, as vice president under the ailing president **Ahmed Hassan al-Bakr**, Saddam signed a 15-year Treaty of Friendship and Cooperation with the Soviet Union. The US responded by giving covert support to Kurdish rebels in their ongoing struggle for independence. The Ba'athists under Saddam responded in turn against the Kurds with forcible displacement and other brutal, repressive measures.

Saddam officially came to power in 1979 after forcing the al-Bakr to resign. After establishing security forces through which he tightly controlled conflicts between the government and the armed forces, he suppressed Shi'a and Kurdish rebellions and established a repressive, authoritarian government. His rule became notorious for human rights abuses, including an estimated 250,000 brutal, arbitrary killings, as well as for the bloody invasions of neighboring Iran and Kuwait.

Many historians note chilling similarities between Saddam's rise and rule and those of Adolf Hitler.



US Secretary of Defense Donald Rumsfeld with Chairman of the Joint Chiefs of Staff General Richard B. Myers and joined by military representatives from 29 countries of the worldwide coalition on the war against terrorism, at the Pentagon, March 11, 2002

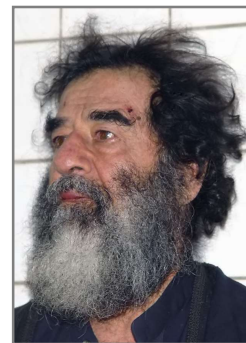
Helene C. Stikkel

Invading Iraq with a multi-national force in 2003 in an action called **Operation Iraqi Freedom**, the US soundly defeated the Iraqi military within two weeks. Prolonged fighting developed into the **Iraq War** when an insurgency of Iraqi and other terrorists from neighboring nations rose up against the new government, employing guerilla-style warfare including suicide bombings and roadside explosive devices called IEDs (improvised explosive devices). Sunni and Shiite factions fought against each other, and both groups attacked the Kurds.

American support for US involvement waned when it became apparent that no weapons of mass destruction were to be found, but others argued that what was now known as the **Global War on Terrorism** needed to continue—and that it was preferable to fight this war in Iraq than in the US.

After the invasion, Saddam Hussein disappeared from public view. One of history's biggest manhunts began in July 2003 to search for him. On the 13th of December in **Operation Red Dawn**, the terrorist dictator was captured by American special forces after he was found in a camouflaged one-man "spider hole" in the ground on a farmhouse property northwest of Baghdad. The deposed ruler was tried for crimes against humanity by the Iraqi Special Tribunal and executed by hanging on December 30, 2006.

Insurgent activity intensified after Saddam's execution, and President Bush responded with an Iraq War troop surge, employing counter-insurgency tactics developed by CIA director General **David Petraeus**. Other operations continued with the goal of eliminating terror organizations throughout the world, concentrating in areas in the Middle East as well as the Philippines, the Sahara, and the Horn of Africa.



Saddam Hussein after his capture

Lesson Three

History Overview and Assignments The Bush Years After 9/11

“Despite ongoing debate, George W. Bush’s presidency is generally acknowledged as one of the most consequential in American history. In the face of challenges brought on by large-scale terrorist attack, an economic crisis of massive proportions, and an unrivaled natural disaster, President Bush succeeded in thwarting further attacks and in achieving a number of conservative objectives while supporting Christian values throughout his tenure in office.”

– from the article below



President Bush with victims of Hurricane Katrina in Biloxi, MS (September 2, 2005)

Suggested Reading and Assignments

- Read the article: *The Bush Years After 9/11*.
- Narrate about today’s reading using the appropriate notebook page. Be sure to include key people, events, and dates within the narration.
- Instead of answering questions, make a chart with two columns on a piece of paper. In one column, list the **legislation, issues, and events** listed in this unit’s first three lessons that occurred during the **Bush administration**. In the other column, describe each piece of legislation, issue, or event in as much detail as possible.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

Key People, Places, and Events

dot.com bubble

National Institutes of Health

National Science Foundation

No Child Left Behind Act

Medicare Act of 2003

Kyoto Protocol

Clear Skies Act

John Kerry

Abu Ghraib Prison

Vladimir Putin

Stephen Harper

Angela Merkel

Tony Blair

Vicente Fox

Hurricane Katrina

2008-2009 Global Financial Crisis

American Recovery and Reinvestment Act of 2009

Troubled Asset Relief Program (TARP)

John Roberts

Samuel Alito

The Bush Years After 9/11

by Mary E. Hall

Bush's Domestic Policy

The course of the Bush administration after mid-2001 was largely set by the 9/11 attacks, but the President did not allow the War on Terror to completely deter him from other objectives. After entering the office during a time of sluggish economy after the bursting of the “**dot.com bubble**,” President Bush had gained a good bit of popularity by signing his sweeping tax cut into law in June 2001. Although the terrorist attacks impacted the economy, signs of improvement were evident by 2003, and another tax cut was passed that year.

In the areas of health and education, the President increased funding for the **National Institutes of Health** and **National Science Foundation** in addition to developing the **No Child Left Behind Act**, designed to reduce the gap in student performance between income levels. Bush also signed the **Medicare Act of 2003**, which provided federal help in paying for prescription medications.

With respect to environmental policies, Bush stated clear opposition to the **Kyoto Protocol**, which sought to establish mandatory emissions limits among industrialized nations, enforcing compliance with emissions-trading sanctions. Bush believed the limits were too idealistic and would be economically harmful, and he maintained that developing countries, with their growing industrial activity, should share in the emissions cuts. Alternatively, Bush created a task force to streamline energy projects and developed the **Clear Skies Act**. This proposed legislation would have amended the Clean Air Act by instituting emissions trading programs, but it never passed under review by the Senate, becoming deadlocked in Committee.

Reelection Campaign

Republicans garnered two Senate seats in 2004, which swung control to the right side of the aisle, while four Republican seats were gained in the House. Bush built his reelection campaign strategy around defeating liberal senator **John Kerry** of Massachusetts. While Kerry was an honored Vietnam veteran, he had opposed the war, and this detracted from his public support. Questions also surfaced concerning Kerry's service record and the validity of his combat medals.

Bush's approval ratings were low at the start of

the campaign due to economic decline, increased violence in the Middle East, and controversy concerning US treatment of war detainees at **Abu Ghraib Prison** in Iraq during the Iraq War. His military record was criticized as well because he had managed to skip over a long waiting list for a position in the Air National Guard, and detractors further claimed that he failed to complete all his duty requirements once he held it.

Bush gained support, however, by expressing his desire to make his tax cuts permanent, asserting that these cuts were aiding economic recovery, and by advocating tax loopholes for job creation. He also had the approval of the evangelical Christian community because of his firm stance on family value issues, and he'd gained popularity among women and Hispanics during his first term.

When the votes came in, Bush was the clear winner by more than 3 million.



George & Laura Bush during the 2005 Inaugural Parade
Series: Photographs Related to the George W. Bush Administration,
1/20/2001 - 1/20/2009 Collection: Records of the White House Photo
Office

Bush's Second Term

After the election, Bush placed high priority on reviving the economy by authorizing more tax cuts and abolishing the “marriage penalty,” which required higher taxes of many married couples than if they'd filed individually. He also stated clear intentions to reform Social Security and immigration policy, strengthen public education, place limits on medical malpractice suits, and continue waging the War on Terror.

One month after his second inauguration, Bush embarked on a European tour in hopes of improving relations between Europe and the US. During this trip he met with leaders from throughout the world,

concluding at the Slovakia Summit—the first time a sitting US president visited this nation since its independence in 1993—and met with Russian president **Vladimir Putin** to discuss Russian democracy, along with other international topics such as the Mideast situation and nuclear talks with North Korea.



President Bush delivering his second Inaugural Address

After the tour, Bush strove to maintain friendly relations with allies, meeting with newly elected Prime Minister **Stephen Harper** of Canada and German chancellor **Angela Merkel**, who supported pro-market changes to German law and won an easy reelection after the nation's lagging economy revived during her first term. It's said that Bush maintained a close relationship with Prime Minister **Tony Blair** of the UK and President **Vicente Fox** of Mexico, although formal diplomatic interactions with these nations were often uneasy. France, which had tried to remain neutral during the Cold War, criticized US intervention in world affairs. With an expanding Muslim population, France resisted Bush's call to help fight the battle against terrorism, despite its support during 1991 Gulf War operations.

Midterm Election Swing

The midterm elections in 2006 swung control of Congress, along with the majority of state governorships, to the Democrats. This, combined with criticism of federal disaster relief efforts after **Hurricane Katrina** devastated New Orleans in 2005, along with the **2008-2009 Global Financial Crisis**, sent the President's approval ratings spiraling downward.

The 2008-2009 Global Financial Crisis

"The Global Financial Crisis of 2008-2009 refers to the massive financial crisis the world faced from 2008 to 2009. The financial crisis took its toll on individuals and institutions around the globe, with millions of Americans being deeply impacted. Financial institutions started to sink, many were absorbed by larger entities, and the US Government was forced to offer bailouts to keep many institutions afloat.

"The crisis, often referred to as 'The Great Recession,' didn't happen overnight. There were many factors present leading up to the crisis, and their effects linger to this day. Let's take a look at a brief outline of the Global Financial Crisis of 2008-2009. The foundation of the global financial crisis was built on the back of the housing market bubble that began to form in 2007. Banks and lending institutions offered low interest rates on mortgages and encouraged many homeowners to take out loans that they couldn't afford.

"With all the mortgages flooding in, lenders created new financial instruments called mortgage-backed securities (MBS), which were essentially mortgages bundled together that could then be sold as securities with minimal risk load due to the fact that they were backed by credit default swaps (CDS). Lenders could then easily pass along the mortgages—and all the risk.

"Outdated regulations that weren't rigorously enforced allowed lenders to get sloppy with underwriting, meaning the actual value of the securities couldn't be established or guaranteed.

The Bubble Bursts

"Banks began to lend recklessly to families and individuals without true means to follow through on the mortgages they'd been granted. Such high-risk (subprime) loans were then inevitably bundled together and passed down the line.

"As the subprime mortgage bundles grew in number to an overwhelming degree, with a large percentage moving into default, lending institutions began to face financial difficulties. It led to the dismal financial conditions around the world during the 2008-2009 period and continued for years to come.

The Aftermath of the Global Financial Crisis of 2008-2009

"Many who took out subprime mortgages eventually defaulted. When they could not pay, financial institutions took major hits. The government, however, stepped in to bail out banks.

“The housing market was deeply impacted by the crisis. Evictions and foreclosures began within months. The stock market, in response, began to plummet and major businesses worldwide began to fail, losing millions. This, of course, resulted in widespread layoffs and extended periods of unemployment worldwide. Declining credit availability and failing confidence in financial stability led to fewer and more cautious investments, and international trade slowed to a crawl.

*“Eventually, the United States responded to the crisis by passing the **American Recovery and Reinvestment Act of 2009**, which used an expansionary monetary policy, facilitated bank bailouts and mergers, and worked towards stimulating economic growth.”*

– Source: “2008-2009 Global Financial Crisis,”
Corporate Finance Institute

(<https://corporatefinanceinstitute.com/resources/knowledge/finance/2008-2009-global-financial-crisis/>). Retrieved 4 April 2022



Flooded I-10/I-610/West End Blvd interchange and surrounding area of northwest New Orleans and Metairie, Louisiana

In addition, the Bush Administration received criticism for making extensive use of Executive Privilege to withhold information from the courts and legislative branch, for instigating a “White House shakeup” in which a number of Cabinet members were replaced, for the Justice

Department’s midterm dismissal of seven US Attorneys, for allegedly violating due process regulations and other Constitutional protections through anti-terrorism surveillance activities, for disregarding treaty obligations, and for obstructing justice in a CIA leak scandal in which the name of a covert agent was publicly made known.



New Orleans Mayor Ray Nagin, Louisiana governor Kathleen Blanco, President Bush, and Louisiana senator David Vitter meet on September 2, 2005 in the aftermath of Hurricane Katrina.

In October of 2008 Bush instituted the controversial **Troubled Asset Relief Program (TARP)**, also known as the “Wall Street Bailout,” the first of several federal relief programs aimed at reversing the financial crisis, which authorized the Treasury Dept. to purchase or insure troubled subprime mortgage assets (where loans had been made in cases where repayment ability was doubtful). Little restriction was apparently placed upon the use of the funds granted, however, and a significant amount reportedly went toward high-level salaries and political contributions.

In the end, George W. Bush’s presidency received mixed reviews. Those in favor credit him with the tremendous accomplishment of heading off any major terrorist attacks after 9/11, and many praise his education initiatives and Medicare prescription drug benefit. Republicans credit him with successful appointments of conservative Supreme Court justices **John Roberts** and **Samuel Alito**, along with his moral integrity—without a hint of personal scandal over two terms.

Opponents criticize Bush’s failure to locate evidence of weapons of mass destruction in Iraq—which formed much of the initial justification for the Iraq War—as well as his management of tax policy and Hurricane Katrina disaster relief. Critics strongly emphasize that his administration should have anticipated the financial crisis of 2008 and

done more to prevent it. Others criticize the “bailout” precedent established by the TARP programs, which was expanded by his successor into multiple industries. Many conservatives argue that Bush did not do enough to advance their causes when he had a supportive legislature and feel he should have worked more actively to prevent their midterm election defeat.

Despite ongoing debate, George W. Bush’s presidency is generally acknowledged as one of the most consequential in American history. In the face of challenges brought on by large-scale terrorist attack, an economic crisis of massive proportions, and an unrivaled natural disaster, President Bush succeeded in thwarting further attacks and in achieving a number of conservative objectives while supporting Christian values throughout his tenure in office.



President Bush discussing border security with Secretary of Homeland Security Michael Chertoff near El Paso (November 2005)
White House photo by Eric Draper

Lesson Four

History Overview and Assignments America’s First African American President

BARACK OBAMA won a decisive victory in November of 2008, soundly defeating John McCain in both popular and Electoral College votes. Dissatisfaction over economic woes had swept across the nation, and the divide between moderate and conservative Republicans had widened. The presidential campaign of 2008 began early, and the candidates fought hard against each other, spending more money than in any other election in American history. In the end, Obama’s message of “Hope and change” and “Yes, we can” succeeded in winning the votes of the majority of the American voters. Those in favor of Obama’s presidency hail the advances he made in liberal policy, government health care, and climate protection. Critics decry those same actions as shifts toward too much government control.



President Barack Obama

Official White House photo by Pete Souza (December 2012)

Key People, Places, and Events

- John McCain
- Hillary Clinton
- Barack Obama
- Dodd-Frank Wall Street Reform and Consumer Protection Act
- Affordable Care Act
- Sonia Sotomayor
- Elena Kagan
- Tea Party
- Osama bin Laden
- Sandy Hook Elementary School
- Islamic State
- 2015 Paris Climate Accords
- 2014 Annexation of Crimea
- 2014 Ukrainian Revolution

Suggested Reading and Assignments

- Review the discussion question, then read the article: *America's First African American President*.
- Narrate about today's reading using the appropriate notebook page. Be sure to answer the discussion questions and include key people, events, and dates within the narration.
- Make a new chart with two columns on a piece of paper. In one column, list the **legislation, issues, and events** listed in the article that took place during the **Obama administration**. In the other column, describe each piece of legislation, issue, or event in as much detail as possible.
- Be sure to visit your **ArtiosHCS** curriculum website for additional resources and any videos and websites assigned for this lesson.

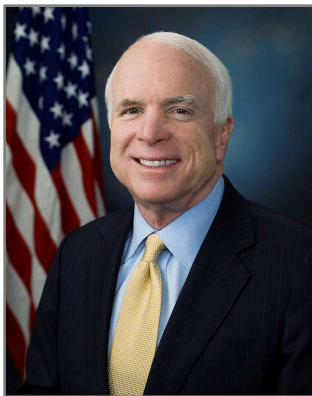
Discussion Questions

1. Describe some of the differences between Senator John McCain and Senator Barack Obama when they ran against each other for the office of the presidency.
2. What were Senator Obama's campaign slogans?
3. What promise did he make with regard to the changes he would bring to Washington politics?
4. Did he keep that promise?
5. How did President Obama essentially nationalize several industries?
6. What were some of his biggest agenda items and initiatives?
7. What were some of the objections to the appointments of Supreme Court Justice Sonia Sotomayor and Elena Kagan?
8. Why did President Obama order forces to Iraq during his second term?
9. Compare reactions of Obama's supporters and critics to his presidency.

America's First African American President

by Mary E. Hall

By the end of the Bush era, frustration over economic woes was sweeping across the nation, and the divide between moderate and conservative Republicans was wide. The presidential campaign of 2008 began early, and the candidates fought hard against each other, spending more money than in any other election in American history.



John Sidney McCain III,
US Senator from Arizona

Arizona senator **John McCain**, a decorated Vietnam POW, gained the Republican nomination by March. The Democratic contest, in contrast, began with ten main candidates but soon narrowed to a heated race between NY senator and former First

Lady **Hillary Clinton**, the initial frontrunner, and Illinois junior senator **Barack Obama**, who sought to become the first African American president of the US.

Early Democratic campaign efforts focused on criticism of the war in Iraq and other Bush policies, and the former first lady appeared to have the nomination in hand at the start. Poll support rose steadily for Obama, though, as he proclaimed his popular message that change was coming to America, and he captured the Iowa caucuses in January. This victory, granted largely by first-time caucus attenders, sent his poll number skyrocketing.

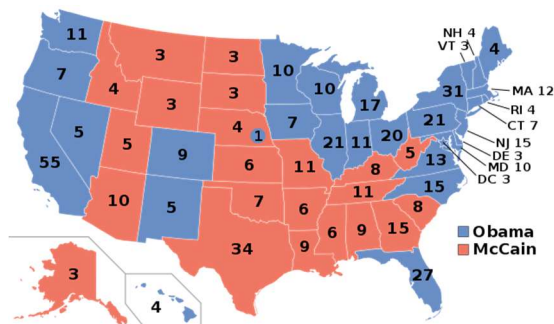


Senator Hillary Rodham Clinton
of New York (2008)

Candidates began to drop out, and Super Tuesday, the February day when the largest number of states hold their primaries simultaneously, resulted in a virtual tie between Obama and Clinton. Democrats, excited by a race between two possible firsts for president—either a woman or an African American—stirred the Democratic nomination race into an aggressive contest. The primaries resulted in numbers so close that the nomination process, normally completed by March, extended into June. Superdelegate endorsements finally locked the nomination for Obama, which was effectively sealed when Clinton conceded the race on June 7.

Obama’s campaign had adopted the theme that “Washington needs change” in response to Clinton’s emphasis on her experience. Once Obama’s opponent field narrowed to John McCain, who also highlighted his extensive Washington experience, Obama’s team strengthened his message, coining the mottos “Hope and change,” and “Yes, we can.” Making extensive use of social media promotion, Obama succeeded in projecting an image of himself as a strong, confident leader, and although critics argued that his speeches lacked substance, his popularity soared among young voters and the African American electorate.

Barack Obama went on to win a decisive victory in November, defeating McCain soundly in both the popular and Electoral College votes. His popularity also helped Democrats add to their majorities in both the House and the Senate, giving him a highly supportive legislature.



2008 Electoral map

Barack Obama’s Administration

Democratic: 2009-2017

Despite candidate Obama’s promises of change and transparency, his presidential selections for high level positions consisted largely of lobbyists and officials from Bill Clinton’s administration, and Hillary Clinton was made Secretary of State. Obama’s stated priorities consisted of universal health care, full employment, a green America, and a

nation that would be respected instead of feared by its enemies.

To these ends, he quickly issued executive orders to overturn bans on federal grants to international abortion services, to shut down the Guantanamo Bay POW detention facility in Cuba, and to raise Dept. of Transportation fuel efficiency standards. He also lifted federal funding restrictions on embryonic stem cell research and expanded federal funding for children’s health care.

Contending that the nation’s free market system was unable to repair the economic crisis and referring to Bush’s TARP program as a precedent, the new president called for massive government intervention. Initiatives included the **Dodd-Frank Wall Street Reform and Consumer Protection Act**, which overhauled the federal financial regulatory system with sweeping reforms, and bailouts granted to corporations considered vital to the nation’s economy. Auto giants made headlines by accepting government bailout funds (with the exception of Ford Motor Co., which declined) and making government-mandated changes to their business methods—with General Motors even accepting the replacement of its CEO with one selected by the government. Through these initiatives, the Obama Administration in effect nationalized several vital industries.

While Dodd-Frank arguably made improvements to financial stability and consumer protection, the overall US economy did not improve, and unemployment continued to increase. In addition, the federal deficit quickly swelled to become the largest in the nation’s history.

The nation’s health care system became President Obama’s next target for government intervention, with the proposal of the **Affordable Care Act**—popularly known as “Obamacare”—a federally run system whereby the government would determine prices and levels for care and require all Americans to purchase health insurance which met government-established standards or pay a steep fine. Irate critics pointed to ineffective and unwieldy systems of socialized medicine in other nations and warned of similar problems, but the complex bill (more than 2,500 pages long) passed in both houses without a single Republican vote.

Obama successfully nominated liberal Supreme Court justices **Sonia Sotomayor** and **Elena Kagan** despite opposition to their broad interpretation of the Constitution and their activist belief that minority and economic status of the

involved legal parties should play into court rulings.

Controversy also assailed the administration when a community organization called ACORN, which had been instrumental to Obama's campaign, came under federal investigation for voter fraud. Also, in July of 2009 the President received strong criticism after he commented that law enforcement had acted "stupidly" during the arrest of African American Harvard law professor Henry Louis Gates, Jr. while Gates was trying to enter the jammed door of his home.¹ Other outcries arose in response to alleged White House information tracking and to proposed federal control over the Internet.

A national movement called the **Tea Party**, outraged at the Obama administration's relentless growth of the government with apparent disregard for Constitutional limits on federal power, sprang up prior to the 2010 midterm elections and garnered enough support for Republicans to achieve a landslide victory, winning control of the House and gaining seats in the Senate. On the state level, Republicans also won most of the available governorships and legislative seats.



Tea Party protesters on the West Lawn of the US Capitol and the National Mall at the Taxpayer March on Washington on September 12, 2009
NYyankees51 - Own work, CC BY-SA 3.0

On May 1, 2011, **Osama bin Laden**, head of the al-Qaeda network responsible for the 9/11 attacks, was killed in a US Navy Seal raid on the terrorist's military compound in Pakistan. No country was willing to accept the body, and it was buried at sea.

Barack Obama's Second Term

During his second term, President Obama

focused largely on domestic issues. His administration pressed for gun control in response to a shooting in 2012 in which 26 children and staff members were killed at **Sandy Hook Elementary School** in Newtown, Connecticut; filed briefs urging the Supreme Court to strike down same-sex marriage bans as unconstitutional; advocated in favor of LGBT objectives; and issued numerous executive orders, predominantly on immigration and climate conservation.

In foreign policy, Obama ordered US forces to Iraq in response to gains made by the **Islamic State** terrorist organization after the 2011 US withdrawal, bolstered and then reduced American troop presence in Afghanistan, promoted discussions that led to the **2015 Paris Climate Accords** on limiting greenhouse gas emissions, initiated sanctions against Russia in response to its **2014 Annexation of Crimea** from Ukraine, made a nuclear agreement with Iran, and negotiated an agreement with Cuba to begin normalizing relations even though Cuba is still communist.

2014 Russian Annexation of Crimea

In August of 2008, a five-day Russo-Georgian War marked an important transition in European politics, in which post-Soviet cooperation with the West dramatically shifted back toward the antagonistic climate of the Cold War. In this short conflict, Russian troops defeated Georgian forces who were seeking to regain control over a pair of regions Russia had seized after the Soviet breakup.

*Next, following the **2014 Ukrainian Revolution** in which Ukraine's pro-Russian, oligarchic regime was overthrown in favor of a pro-European, decommunized government, Russia invaded Ukraine and seized Crimea.*

Those in favor of Obama's presidency hail the advances he made in liberal policy, government health care, and climate protection, while critics decry his initiatives as advances toward socialism, along with reductions he made to military support, his extensive and possibly overreaching use of executive privilege, and his failure to engender unity between the races despite his mixed-race ethnicity, among numerous other complaints. One thing is for certain—the American public was far more bitterly divided in fundamental ideology by the end of his administration than it was at the beginning.

1. Gates and his taxi driver were witnessed by a passerby trying to unjam the door. The passerby, believing the scene to be a break-in attempt, notified police, and Gates was arrested for disorderly conduct. Prosecutors later dropped the charges. After a media storm in response to President Obama's comment, the President restored a sense of calm by inviting Gates and the arresting officer to share a beer with him and the Vice President at the White House.

The Artios Home Companion Series

Appendix: Events From 2016-Forward

Teacher Overview

EVENTS FROM 2016 AND FORWARD will not be published in this book. This time period will appear online in a slightly different format than our printed HCS text. Please be sure to visit www.artioshcs.com to take advantage of these resources.



Interior of the World Trade Center Transportation Hub, NY
Anthony Quintano. CC BY 2.0

Leading Ideas

God is sovereign over the affairs of men.

And He made from one man every nation of mankind to live on all the face of the earth, having determined allotted periods and the boundaries of their dwelling place.

– Acts 17:26 (review)

Dishonesty is sin and will be punished.

Whoever walks in integrity walks securely, but he who makes his ways crooked will be found out.

– Proverbs 10:9

The Bible provides the ethics upon which to judge people and nations.

– Exodus 20:1-17 (review)

The Artios Home Companion Series

Introduction to Language Arts Curriculum For Parents

Language Arts Units

This Artios Academies curriculum takes an integrated approach to teaching language arts. All literature selections, and writing assignments are designed to integrate directly with the history topics that are being studied in order to maximize both your students' understanding of the time period and their retention of information. While it is written with the student as the audience, it is intended to be used with parental input, feedback, and supervision.

Notebook

It is highly suggested that your student(s) keep a notebook for their language arts work throughout the year. They may want to organize this notebook with dividers, and include sections for Author Profiles, Writing Projects, Literary Analysis, and any other areas that you or they may desire. Your students may enjoy decorating a cover for their notebook.

Literature Selections

The literature selections in this curriculum have been carefully chosen and ordered to align with the historical topics that students are studying simultaneously. It is highly suggested that parents also take time to study the books to assess the student's comprehension and understanding of the story. Be available for discussion of some of the themes and ideas that are woven throughout the text. Make sure to ask some questions that have simple, concise answers as well as ones that require some thought. This also makes for a great opportunity to discuss the worldviews represented within each book and to help your students evaluate the truths and fallacies they encounter in different belief systems.

This curriculum does not have vocabulary assignments; however, vocabulary selections are included in the textbook. A diligent study of vocabulary can improve test scores and writing skills. Encourage your student to become diligent and organized in the study of vocabulary.

The books you will need for this curriculum are as follows (listed in order of use):

- *Uncle Tom's Cabin* by Harriett Beecher Stowe
- *A Doll's House* by Henrik Ibsen
- *Animal Farm* by George Orwell
- *Out of the Silent Planet* by C.S. Lewis

This list is short because much of the literature we will be studying this year will be poetry and plays that will be available online.

Writing Assignments

The writing assignments provided in this curriculum are designed to meet the standards of any high school preparatory program. They are designed to prepare these students for more rigorous college-level assignments. Our goal is to help students grow in their ease and skill in writing and that they are exposed to a wide variety of writing experiences.

Grading rubrics are also included for assignments to assist parents in evaluating their students' writing. Giving these grading rubrics to a student prior to beginning a writing exercise can be helpful for them in understanding what is expected of the assignment; however, it is not necessary that they be used. It is useful to give students guidelines that will help them feel confident in working through an assignment.

Additional literature projects are provided within the online resources, and these cross-curricular projects allow students to express themselves creatively in a variety of ways. While it is not necessary to use every assignment listed in the curriculum, it is important to supplement assignments in ways that allow your students to supplement their literature studies with literature projects that fit their schedule and interests.

Parents and students need to be aware of the seriousness of **plagiarism**. Here is an informative website to use to acquaint yourself and your student(s) with this:

<http://www.plagiarism.org/article/what-is-plagiarism>

Website Content

Website resources are provided along with this curriculum for your convenience on the student's **ArtiosHCS** curriculum website at www.ArtiosHCS.com.

There is a section called **HIGH SCHOOL LANGUAGE ARTS RESOURCES for Modern Time Period: Formats, Models, and Rubrics** which has links to resources that are not specific to any literary work or topic studied, which provide examples of types and styles of the writing assignments being explored, along with grading rubrics. When the curriculum refers to **Resources**, it is referring to this section.

For each literary work we study, within the Language Arts section of the **ArtiosHCS** curriculum website at www.ArtiosHCS.com you will find resources and assignments which will help you to extend and enrich your students' understanding of the literature, including additional literature projects. Some material you might desire to print and use.

While every attempt has been made to ensure the accuracy and appropriateness of any Internet links that are provided, please use caution and oversight when allowing your students to access online information. This content will be monitored regularly and updated as necessary.



The Artios Home Companion Series

Literature and Composition

Units 1 – 4: Poetry of the Modern Time Period

Units 1-4 will focus on poetry of the Modern Time Period through the poets. You will learn how to analyze a poem through the study of the author, literary devices, and your own imagination. You will also learn how to recognize an author's work through their style of writing. Each unit will focus on a different poet's life and works: John Keats, Edgar Allan Poe, Henry Wadsworth Longfellow, and Gerard Manley Hopkins.

At the end of Unit 4, you will be asked to use the skills taught in the previous units to write a poetry explication essay.

Unit 1 – Author Spotlight: John Keats

John Keats was born in London in 1795. He lost both of his parents at a young age but was provided for by two merchants who made sure Keats was given the opportunity to learn a trade. He was trained to be an apothecary, but never opened a business. He instead devoted his short life to the pursuit of poetry. He was a respected poet among his contemporaries, but a family history of failing health caught up to him early. He fell ill with tuberculosis and passed away when he was only 25 years old. His poetry is his legacy and his pieces some of the most moving of his time period.

- For more information on John Keats, please visit the websites found on your ArtiosHCS curriculum website for this unit

Unit 1 – Assignments

- Read Unit 1 – Assignment Background.
- Read “Ode to a Nightingale” by John Keats, found on your **ArtiosHCS** curriculum website.

Activity While Reading: As you read the poem, write down in your Reading Journal any words that are unfamiliar to you, and write down their definitions.

- In your Reading Journal:
 - Write what you think the poem is about. How does the author's biography influence his work?
 - Write down which literary devices the author used in his poetry. Give examples from the poem.
 - Write an author profile on John Keats. Instructions on author profiles can be found in the **Resources** section of your **ArtiosHCS** curriculum website.
- Choose a theme that is discussed in the poem and create a visual display that reflects the theme you've chosen. It can be an original photograph, a painting, an original poem, or song, etc. Creativity is encouraged for this project.

Unit 1 – Assignment Background

“Genuine poetry can communicate before it is understood.” – T.S. Eliot

An Introduction to Poetry—Part 1:

Poetry is unique among literary forms in that it brings out the musicality of language. Poets use words to bring out emotions in the reader. As a painter chooses his colors, so a poet carefully selects his words. Poems are used in literature to express a feeling, a worldview, or an idea. Poetry combines freedom of imagination with the structure of form. Rhythm holds the poem together—sturdy walls bringing order to the chaos—while imagery runs through the poem, hanging curtains and adding color.

This combination of structure and imagination can be seen clearly in modern poetry. There are two main types of modern poetry: Open form and fixed form. Open form poetry allows authors to structure rhythm and rhyme however they like. There is no limit to the number of stanzas, no specific rhythm, and no set rhyme scheme. The author has complete control as to how the poem should be organized. Fixed poetry refers to the “types” of poems already in existence. For example, William Shakespeare invented a specific type of poem – a Shakespearean

sonnet. A “sonnet” is a specific type of poem. Sonnets have fourteen lines, a specific rhyme scheme, and a particular rhythm that hopeful sonnet writers must try to follow. A sonnet is a fixed type of poetry. Neither form is better than the other, they are simply different.

Along with rhythm and rhyme, poets also use many other established literary devices in order to construct their work.

The following is an excerpt from an article published by the California Federation of Chaparral Poets, Inc.:

The Sounds of Words

Words or portions of words can be clustered or juxtaposed to achieve specific kinds of effects when we hear them. The sounds that result can strike us as clever and pleasing, even soothing. Others we dislike and strive to avoid. These various deliberate arrangements of words have been identified.

Alliteration: Repeated consonant sounds at the beginning of words placed near each other, usually on the same or adjacent lines. A somewhat looser definition is that it is the use of the same consonant in any part of adjacent words.

Example: fast and furious

Example: Peter and Andrew patted the pony at Ascot.

In the second example, both *P* and *T* are reckoned as alliteration. It is noted that this is a very obvious device and needs to be handled with great restraint, except in specialty forms such as limerick, cinquain, and humorous verse.

Assonance: Repeated vowel sounds in words placed near each other, usually on the same or adjacent lines. These should be in sounds that are accented, or stressed, rather than in vowel sounds that are unaccented.

Example: He’s a bruisin’ loser.

In the second example under Alliteration, the short *A* sound in *Andrew*, *patted*, and *Ascot* would be assonant.

Consonance: Repeated consonant sounds at the ending of words placed near each other, usually on the same or adjacent lines. These should be in sounds that are accented, or stressed, rather than in vowel sounds that are unaccented. This produces a pleasing kind of near-rhyme.

Example: boats into the past

Example: cool soul

Cacophony: A discordant series of harsh, unpleasant sounds helps to convey disorder. This is often furthered by the combined effect of the meaning and the difficulty of pronunciation.

Example: My stick fingers click with a snicker
And, chuckling, they knuckle the keys;
Light-footed, my steel feelers flicker
And pluck from these keys melodies.
–“Player Piano,” John Updike

Euphony: A series of musically pleasant sounds, conveying a sense of harmony and beauty to the language.

Example: Than Oars divide the Ocean,
Too silver for a seam—
Or Butterflies, off Banks of Noon
Leap, plashless as they swim.
–“A Bird Came Down the Walk,” Emily Dickenson (last stanza)

Onomatopoeia: Words that sound like their meanings. In *Hear the steady tick of the old hall clock*, the word *tick* sounds like the action of the clock. If assonance or alliteration can be onomatopoeic, as the sound ‘*ck*’ is repeated in *tick* and *clock*, so much the better. Sounds should suit the tone – heavy sounds for weightiness, light for the delicate. *Tick* is a light word, but transpose the light *T* to its heavier counterpart, *D*; and transpose the light *CK* to its heavier counterpart *G*, and *tick* becomes the much more solid and down-to-earth *dig*.

Example: boom, buzz, crackle, gurgle, hiss, pop, sizzle, snap, swoosh, whirl, zip

Repetition: The purposeful re-use of words and phrases for an effect. Sometimes, especially with longer phrases that contain a different key word each time, this is called *parallelism*. It has been a central part of poetry in many cultures. Many of the Psalms use this device as one of their unifying elements.

Example: I was glad; so very, very glad.

Example: Half a league, half a league, Half a league onward...

Example: Cannon to right of them,
Cannon to left of them,
Cannon in front of them,
Volley'd and thunder'd...

Example: For without cause they hid their net for me;
Without cause they dug a pit for my life. (Psalm 35:7 ESV)

Unit 2 – Author Spotlight: Edgar Allan Poe

Edgar Allan Poe was born in Boston in 1809. His mother died when he was two years old, resulting in his being adopted by Mr. John Allan. Allan and Poe had a rough relationship, with Mr. Allan wanting Poe's life to head in one direction, while Poe wanted to go in another. Poe eventually reconciled with Allan, but their relationship remained strained. Poe did not come to fame quickly. In fact, he was a struggling writer for many years. As a writer, Poe was enthralled with the study of the macabre, the darker side of life. Many of his poems and short stories are studied today as an example of Gothic (dark) writing in the early nineteenth century. Even though Poe struggled in his lifetime, he is one of the most studied authors in American literature today.

- For more information on **Edgar Allan Poe**, please visit the websites found on your **ArtiosHCS** curriculum website for this unit.

Unit 2 – Assignments

- Read Unit 2 – Assignment Background.
- Read “The Bells” by Edgar Allan Poe found on your **ArtiosHCS** curriculum website.

Activity While Reading: As you read the poem, write down in your Reading Journal any words that are unfamiliar to you, and write down their definitions.

- In your Reading Journal:
 1. Write down what you think the poem is about.
 2. Write down which literary devices the author used in his poetry. Give examples from the poem.
 3. Write an original poem, of at least eight lines, in the style of Edgar Allan Poe.
 4. Write an author profile on Edgar Allan Poe. (Instructions on author profiles can be found on your **ArtiosHCS** curriculum website in the **Resources** section.)

Unit 2 – Assignment Background

An Introduction to Poetry—Part 2:

The following is an excerpt from an article published by the California Federation of Chaparral Poets, Inc.

A poet uses words more consciously than any other writer. Although poetry often deals with deep human emotions or philosophical thought, people generally don't respond very strongly to abstract words, even the words describing such emotions and thoughts. The poet, then, must embed within his work those words which *do* carry strong visual and sensory impact, words which are fresh and spontaneous but vividly descriptive. He must carefully pick and choose words that are just right. It is better to *show* the reader than to merely *tell* him.

Imagery: The use of vivid language to generate ideas and/or evoke mental images, not only of the visual sense, but of sensation and emotion as well. While most commonly used in reference to figurative language, imagery can apply to any component of a poem that form sensory experience and emotional response, and also applies to the concrete things so brought to mind.

Poetry works its magic by the way it uses words to evoke “images” that carry depths of meaning. The poet's carefully described impressions of sight, sound, smell, taste, and touch can be transferred to the thoughtful reader through imaginative use and combinations of diction. In addition to its more tangible initial impact, effective imagery has the potential to tap the inner wisdom of the reader to arouse meditative and inspirational responses.

Related images are often clustered or scattered throughout a work, thus serving to create a particular *mood* or *tone*. Images of disease, corruption, and death, for example, are recurrent patterns shaping our perceptions of Shakespeare's *Hamlet*.

Examples:

- **Sight:** Smoke mysteriously puffed out from the clown's ears.
- **Sound:** Tom placed his ear tightly against the wall; he could hear a faint but distinct *thump thump thump*.
- **Touch:** The burlap wall covering scraped against the little boy's cheek.
- **Taste:** A salty tear ran onto her lips.
- **Smell:** Cinnamon! That's what wafted into his nostrils.

Synesthesia: An attempt to fuse different senses by describing one kind of sense impression in words normally used to describe another.

Example: The sound of her voice was sweet.

Examples: a loud aroma, a velvety smile

Tone, Mood: The means by which a poet reveals attitudes and feelings, in the style of language or expression of thought used to develop the subject. Certain tones include not only irony and satire, but may be loving, condescending, bitter, pitying, fanciful, solemn, and a host of other emotions and attitudes. Tone can also refer to the overall mood of the poem itself, in the sense of a pervading atmosphere intended to influence the readers' emotional response and foster expectations of the conclusion.

Another use of tone is in reference to pitch or to the demeanor of a speaker as interpreted through inflections of the voice; in poetry, this is conveyed through the use of connotation, diction, figures of speech, rhythm, and other elements of poetic construction.

Unit 3 – Author Spotlight: Henry Wadsworth Longfellow

Henry Wadsworth Longfellow was born in 1807 in America. He was born into privilege, with his father being a lawyer and politician in Boston. Longfellow received top marks in college, and after graduation toured Europe which greatly influenced his work. Upon returning to America, he continued to write and teach for the remainder of his life. He was married twice but lost both wives to illness and was the primary caregiver of his children. The latter part of his life was spent in translating Dante's "Divine Comedy" into English. He is considered by some to be the best American poet of his time.

- For more information on **Henry Wadsworth Longfellow**, please visit the websites found on your **ArtiosHCS** curriculum website for this unit.

Unit 3 – Assignments

- Read Unit 3 – Assignment Background.
- Read "The Children's Hour" by Longfellow, found on your **ArtiosHCS** curriculum website.
- Read the information on poetry explications found on your **ArtiosHCS** curriculum website.
- In your Reading Journal:
 1. Write down what you think the poem is about and write a paraphrase of the poem.
 2. Tell what rhyme scheme the poem has, how many stanzas it contains, and what the overall tone of the poem is.
 3. List the literary devices which the author used in his poetry. Give examples from the poem.
 4. Write an author profile on Henry Wadsworth Longfellow. Instructions on author profiles can be found on your **ArtiosHCS** curriculum website.

Unit 3 – Assignment Background

An Introduction to Poetry—Part 3:

The following is an excerpt from an article published by the California Federation of Chaparral Poets, Inc.

Most words convey several meanings or shades of meaning at the same time. It is the poet's job to find words which, when used in relation to other words in the poem, will carry the precise intention of thought. Often, some of the more significant words may carry several layers or "depths" of meaning at once. The ways in which the meanings of words are used can be identified.

Allegory: A representation of an abstract or spiritual meaning. Sometimes it can be a single word or phrase, such as the name of a character or place. Often, it is a symbolic narrative that has not only a literal meaning, but a larger one understood only after reading the entire story or poem.

Allusion: A brief reference to some person, historical event, work of art, or Biblical or mythological situation or character.

Ambiguity: A word or phrase that can mean more than one thing, even in its context. Poets often search out such words to add richness to their work. Often, one meaning seems quite readily apparent, but other, deeper and darker meanings, await those who contemplate the poem.

Example: Robert Frost’s “The Subverted Flower”

Analogy: A comparison, usually something unfamiliar with something familiar.

Example: The plumbing took a maze of turns where even water got lost.

Apostrophe: Speaking directly to a real or imagined listener or inanimate object; addressing that person or thing by name.

Example: O Captain! My Captain! Our fearful trip is done...

Cliché: Any figure of speech that was once clever and original but through overuse has become outdated. If you’ve heard more than two or three other people say it more than two or three times, chances are the phrase is too timeworn to be useful in your writing.

Example: busy as a bee

Connotation: The emotional, psychological, or social overtones of a word; its implications and associations apart from its literal meaning. Often, this is what distinguishes the *precisely correct* word from one that is merely acceptable.

Contrast: Closely arranged things with strikingly different characteristics.

Example: He was dark, sinister, and cruel; she was radiant, pleasant, and kind.

Denotation: The dictionary definition of a word; its literal meaning apart from any associations or connotations. Students must exercise caution when beginning to use a thesaurus, since often the words that are clustered together may share a *denotative meaning*, but not a *connotative* one, and the substitution of a word can sometimes destroy the mood, and even the meaning, of a poem.

Euphemism: An understatement, used to lessen the effect of a statement; substituting something innocuous for something that might be offensive or hurtful.

Example: She is at rest. (meaning, she’s dead)

Hyperbole: An outrageous exaggeration used for effect.

Example: He weighs a ton.

Irony: A contradictory statement or situation to reveal a reality different from what appears to be true.

Example: Wow, thanks for the expensive gift...let’s see: did it come with a Fun Meal or the Burger King equivalent?

Metaphor: A direct comparison between two unlike things, stating that one *is* the other or *does the action* of the other.

Example: He’s a zero.

Example: Her fingers danced across the keyboard.

Metonymy: A figure of speech in which a person, place, or thing is referred to by something closely associated with it.

Example: The White House stated today that...

Example: The Crown reported today that...

Oxymoron: A combination of two words that appear to contradict each other.

Examples: a pointless point of view; bittersweet

Paradox: A statement in which a seeming contradiction may reveal an unexpected truth.

Example: The hurrier I go the behinder I get.

Personification: Attributing human characteristics to an inanimate object, animal, or abstract idea.

Example: The days crept by slowly, sorrowfully.

Pun: Word play in which words with totally different meanings have similar or identical sounds.

Example: Like a firefly in the rain, I'm de-lighted.

Simile: A direct comparison of two unlike things using "like" or "as."

Example: He's as dumb as an ox.

Example: Her eyes are like comets.

Symbol: An ordinary object, event, animal, or person to which we have attached extraordinary meaning and significance – a flag to represent a country, a lion to represent courage, a wall to symbolize separation.

Example: A small cross by the dangerous curve on the road reminded all of Johnny's death.

Synecdoche: Indicating a person, object, etc. by letting only a certain part represent the whole.

Example: All hands on deck.

Unit 4 – Author Spotlight: Gerard Manley Hopkins

Gerard Manley Hopkins was born in London in 1844. He grew up the eldest of nine children and was profoundly influenced by the Catholic faith. Hopkins was a popular poet during his college years, but after he graduated, he went in search of a way to deepen his faith. He eventually became a Jesuit priest, and for a time, did not write any poetry because he felt it was too self-serving. He did return to poetry, but his work came first, and many of his pieces were not published during his lifetime. He is considered a poet of the Romantic time period, and as such was a man who deeply struggled with his identity in God's tapestry. He worked out that struggle through the written word.

- For more information on **Gerard Manley Hopkins**, please visit the websites found on your **ArtiosHCS** curriculum website for this unit.

Unit 4 – Assignments

- Read Unit 4 – Assignment Background.
- Read "God's Grandeur" by Gerard Manley Hopkins found on your **ArtiosHCS** curriculum website.
- Write an author biography on Gerard Manley Hopkins. Remember, instructions on author profiles can be found on your **ArtiosHCS** curriculum website in **Resources**.
- In your Reading Journal:
 1. Write down what you think the poem is about.
 2. Write down which literary devices the author used in his poetry. Give examples from the poem.
 3. Write a paraphrase of the poem.
 4. Tell what rhyme scheme the poem has.
 5. Using the information gathered from these units and your **ArtiosHCS** curriculum website, write a poetry explication paper on one of the poems studied in Units 1-4. Make sure it is proofread, and free of any grammatical errors. Use the **Rubric** in the **Resources** section of your **ArtiosHCS** curriculum website to help you.

Unit 4 – Assignment Background

An Introduction to Poetry—Part 4

The following is an excerpt from an article published by the California Federation of Chaparral Poets, Inc.

Arranging the Words

Words follow each other in a sequence determined by the poet. In order to discuss the arrangements that result, certain terms have been applied to various aspects of that arrangement process. Although in some ways these sequences seem arbitrary and mechanical, in another sense they help to determine the nature of the poem. These various ways of organizing words have been identified.

Point of View: The author's point of view concentrates on the vantage point of the speaker, or "teller" of the story or poem. This may be considered the poem's "voice"—the pervasive presence behind the overall work. This is also sometimes referred to as the *persona*.

- 1st Person: the speaker is a character in the story or poem and tells it from his/her perspective (uses “I”).
- 3rd Person limited: the speaker is not part of the story but tells about the other characters through the limited perceptions of one other person at a time.
- 3rd Person omniscient: the speaker is not part of the story but is able to “know” and describe what all characters are thinking.

Line: The line is fundamental to the perception of poetry, marking an important visual distinction from prose. Poetry is arranged into a series of units that do not necessarily correspond to sentences, but rather to a series of metrical feet. Generally, but not always, the line is printed as one single line on the page. If it occupies more than one line, its remainder is usually indented to indicate that it is a continuation.

- There is a natural tendency when reading poetry to pause at the end of a line, but the careful reader will follow the punctuation to find where natural pauses should occur.
- In traditional verse forms, the length of each line is determined by convention, but in modern poetry the poet has more latitude for choice.

Verse: One single line of a poem arranged in a metrical pattern. Also, a piece of poetry or a particular form of poetry such as *free verse*, *blank verse*, etc., or the art or work of a poet.

The popular use of the word *verse* for a stanza or associated group of metrical lines is not in accordance with the best usage. A stanza is a *group* of verses.

Stanza: A division of a poem created by arranging the lines into a unit, often repeated in the same pattern of meter and rhyme throughout the poem; a unit of poetic lines (a “paragraph” within the poem). The stanzas within a poem are separated by blank lines.

Stanzas in modern poetry, such as *free verse*, often do not have lines that are all of the same length and meter, nor even the same number of lines in each stanza. Stanzas created by such irregular line groupings are often dictated by meaning, as in paragraphs of prose.

Stanza Forms: The names given to describe the number of lines in a stanzaic unit, such as: *couplet* (2), *tercet* (3), *quatrain* (4), *quintet* (5), *sestet* (6), *septet* (7), and *octave* (8). Some stanzas follow a set rhyme scheme and meter in addition to the number of lines and are given specific names to describe them, such as, *ballad meter*, *ottava rima*, *rhyme royal*, *terza rima*, and *Spenserian stanza*.

Stanza forms are also a factor in the categorization of whole poems described as following a *fixed form*.

Rhetorical Question: A question solely for effect, which does not require an answer. By the implication the answer is obvious, it is a means of achieving an emphasis stronger than a direct statement.

Example: Could I but guess the reason for that look?

Example: O, Wind, if Winter comes, can Spring be far behind?

Rhyme Scheme: The pattern established by the arrangement of rhymes in a stanza or poem, generally described by using letters of the alphabet to denote the recurrence of rhyming lines, such as the *ababcc* of the *Rhyme Royal* stanza form.

- Capital letters in the alphabetic rhyme scheme are used for the repeating lines of a refrain; the letters *x* and *y* indicate unrhymed lines.
- In quatrains, the popular rhyme scheme of *abab* is called *alternate rhyme* or *cross rhyme*. The *abba* scheme is called *envelope rhyme*, and another one frequently used is *xaxa* (This last pattern, when working with students, is generally easier for them to understand when presented as *abcb*, as they associate matched letters with rhymed words).

Enjambment: The continuation of the logical sense—and therefore the grammatical construction—beyond the end of a line of poetry. This is sometimes done with the title, which in effect becomes the first line of the poem.

Form: The arrangement or method used to convey the content, such as *free verse*, *ballad*, *haiku*, etc. In other words, the “way-it-is-said.” A variably interpreted term, however, it sometimes applies to details within the composition of a text but is probably used most often in reference to the structural characteristics of a work as it compares to (or differs from) established modes of conventionalized arrangements.

Open: poetic form free from regularity and consistency in elements such as rhyme, line length, and metrical form.

Closed: poetic form subject to a fixed structure and pattern.

Blank Verse: unrhymed iambic pentameter (much of the plays of Shakespeare are written in this form).

Free Verse: lines with no prescribed pattern or structure—the poet determines all the variables as seems appropriate for each poem.

Couplet: a pair of lines, usually rhymed; this is the shortest stanza.

Heroic Couplet: a pair of rhymed lines in iambic pentameter (traditional heroic epic form).

Quatrain: a four-line stanza, or a grouping of four lines of verse



Joseph Severn's depiction of Keats listening to the nightingale (c.1845)

Units 5 – 9: Literary Analysis

Uncle Tom's Cabin

by Harriett Beecher Stowe

Literature for Units 5 – 9

Uncle Tom's Cabin, by Harriett Beecher Stowe, gives a fictional but hard look at what life would have been like for African American slaves in the 1800s. Stowe was an abolitionist who believed that the participation in enslaving another human being was in direct opposition to God's laws. She grew up surrounded by slavery, and as an adult, decided to use her talents as a writer to pen an anti-slavery novel.

Stowe's tale follows two different story lines: the story of Tom, a man more concerned with the freedom of others than his own safety, and the story of George and Eliza Harris, a couple who have been separated and are desperately trying to reunite and flee to Canada.

This is not an easy story to read, nor was it an easy one for Stowe to tell. She knew the power of Story and used her talents to make people aware of the cultural evils facing the nation. She wrote the novel to get people's attention, and to let them have a taste of what they were letting happen in America. She did not shy away from exploring the brutality of slavery, nor did she gloss over the pain that slavery caused.

Uncle Tom's Cabin is a story that needs retelling, and that is relevant to our culture today. As long as sin exists in this world, God will raise up warriors to fight the injustice, the social evils, and the pain that sin brings. Harriett Beecher Stowe was a warrior, and her manuscript, a sharp reminder that change will never occur unless people are willing to stand against injustice, and fight against sin.

Author Spotlight: Harriet Beecher Stowe

Harriet Beecher Stowe was born in America in 1811 and grew up in a family that encouraged the sharing of ideas and the preservation of human rights. All of the children in the family were raised to make a difference and influence society for good. Stowe enjoyed writing because she felt that it gave her a social platform on which she could express her views on the injustices facing her society. She was pro-women's education, and extremely anti-slavery. She successfully used her talents to encourage social change in her time period.

- For more information on **Harriett Beecher Stowe**, please visit the websites found on your **ArtiosHCS** curriculum website for this unit

Unit 5 – Assignments

- Read the assignment background information.
- Read Chapters I, III, IV, V, VII, IX, X, XI and XII (1, 3, 4, 5, 7, 9, 10, 11 and 12) of *Uncle Tom's Cabin*.
- In your Reading Journal:
 - Write a summary of events that take place in each chapter you read.
 - Answer this question: "What sort of man is Tom?"
 - Describe Tom's reason for not running away.
 - Answer this question: "Why do you believe Harriett Beecher Stowe portrayed him in the way she did?"

Unit 5 – Assignment Background

The following is the preface to the novel which appears in the first edition of *Uncle Tom's Cabin*.

Harriet Beecher Stowe
Boston: Jewett & Co., 1852

First Edition Preface

The scenes of this story, as its title indicates, lie among a race hitherto ignored by the associations of polite and refined society; an exotic race, whose ancestors, born beneath a tropic sun, brought with

them, and perpetuated to their descendants, a character so essentially unlike the hard and dominant Anglo-Saxon race, as for many years to have won from it only misunderstanding and contempt.

But another and better day is dawning; every influence of literature, of poetry, and of art, in our times, is becoming more and more in unison with the great master chord of Christianity, “good-will to man.” The poet, the painter, and the artist now seek out and embellish the common and gentler humanities of life, and, under the allurements of fiction, breathe a humanizing and subduing influence, favorable to the development of the great principles of Christian brotherhood.

The hand of benevolence is everywhere stretched out, searching into abuses, righting wrongs, alleviating distresses, and bringing to the knowledge and sympathies of the world the lowly, the oppressed, and the forgotten. In this general movement, unhappy Africa is at last remembered; Africa, who began the race of civilization and human progress in the dim, gray dawn of early time, but who, for centuries, has lain bound and bleeding at the foot of civilized and Christianized humanity, imploring compassion in vain.

But the heart of the dominant race, who have been her conquerors, her hard masters, has at length been turned towards her in mercy; and it has been seen how far nobler it is in nations to protect the feeble than to oppress them. Thanks be to God, the world has at length outlived the slave-trade!

The object of these sketches is to awaken sympathy and feeling for the African race, as they exist among us; to show their wrongs and sorrows, under a system so necessarily cruel and unjust as to defeat and do away the good effects of all that can be attempted for them, by their best friends, under it. In doing this, the author can sincerely disclaim any invidious feeling towards those individuals who, often without any fault of their own, are involved in the trials and embarrassments of the legal relations of slavery. Experience has shown her that some of the noblest of minds and hearts are often thus involved; and no one knows better than they do, that what may be gathered of the evils of slavery from sketches like these is not the half that could be told of the unspeakable whole.

In the Northern States, these representations may, perhaps, be thought caricatures; in the Southern States are witnesses who know their fidelity. What personal knowledge the author has had, of the truth of incidents such as are here related, will appear in its time. It is a comfort to hope, as so many of the world’s sorrows and wrongs have, from age to age, been lived down, so a time shall come when sketches similar to these shall be valuable only as memorials of what has long ceased to be. When an enlightened and Christianized community shall have, on the shores of Africa, laws, language, and literature, drawn from among us, may then the scenes from the house of bondage be to them like the remembrance of Egypt to the Israelite,—a motive of thankfulness to Him who hath redeemed them! For, while politicians contend, and men are swerved this way and that by conflicting tides of interest and passion, the great cause of human liberty is in the hands of One, of whom it is said:

*“He shall not fail nor be discouraged
Till he have set judgment in the earth.”*

*“He shall deliver the needy when he crieth,
The poor, and him that hath no helper.”*

*“He shall redeem their soul from deceit and violence,
And precious shall their blood be in his sight.”*

Unit 6 – Assignments

- Read Unit 6 – Assignment Background.
- Read Chapters XIII, XV, XVI, XVII, XVIII, XX, XXIV, XXV, and XXVI, (13, 15, 16, 17, 18, 20, 24, 25, and 26) of *Uncle Tom's Cabin*.
- In your Reading Journal:
 - Summarize the events that have taken place in this week's reading.
 - Answer: "What characters are you rooting for? What good qualities have you seen in the characters?"
 - Answer: "How does Stowe's writing portray her worldview?"

Unit 6 – Assignment Background

When analyzing a piece of literature, it is imperative that one studies the piece from many angles. Simply giving an overview of a plot, or a brief description of a character will not suffice. The structure of a literary analysis essay allows a closer look at the elements of literature: plot, character, setting, worldview, writing style, and theme. Unlike a book report, which gives a broad view of many of these elements, a literary analysis gives a close look at one or two.

A book report "tells" how the author combined these elements. A literary analysis "shows" how these elements are used to create a certain tone within the work of literature.

The analysis should maintain the structure of an essay. It should appear like this:

Paragraph One: Introduction. This paragraph should introduce the story, provide background information, and give any other information that will "hook" the reader, and will help them to understand your analysis.

The last sentence of the introduction should be your **thesis statement**. A thesis statement brings the essay into focus and tells the reader what you will be analyzing.

An example of an introductory paragraph:

"When you hear the name 'Frankenstein,' what comes to mind? Many people today would say something like, 'you mean that large green monster who is brought out in the month of October?' Sadly, that is what has become of the classic novel which author Mary Shelley wrote in the early nineteenth century. The name of Frankenstein is not even the name of the monster, but rather of his creator. The actual novel is nothing like the cartoonish version of the story that is portrayed today but is a moving look at how pride will destroy everything in its path. The novel falls into the genre of tragic literature because it shows the downfall of the protagonist, the missed opportunity for redemption, and the heartache that only death will heal."

The **body paragraphs** should expound on the thesis. There are normally three to five body paragraphs in the essay, and each body paragraph should contain support from the text to support the thesis. Also, each body paragraph should begin with a topic sentence, which will tell the reader what each paragraph will cover.

The last paragraph in the essay is the **conclusion**, which brings everything together and brings the topic around to the thesis again. It is not the time to insert new material, but to solidify the ideas you've written to your reader.

Unit 7 – Assignments

- Read Unit 7 – Assignment Background.
- Read Chapters XXVIII, XXIX, XXX, XXXII, XXXIII, XXXVII, XXXVIII, and XL, (28, 29, 30, 32, 33, 37, 38, and 40) of *Uncle Tom's Cabin*.
- Choose a topic for your literary analysis. This can be a character study, an analysis of Stowe's writing style, an analysis of how strong her message was in the story, etc.
- Explore writing an outline on the **Resources** section of your **ArtiosHCS** curriculum website.
- Create an outline for your literary analysis.

Unit 7 – Assignment Background

Now that you've studied the structure of a literary analysis, it is time to begin the writing process.

The first thing that you will need to do is to come up with a "working thesis" for your essay. A working thesis means your main idea for the paper. You write a thesis in order to create your outline. This thesis may change once you write your rough draft. That is normal. You can always go back and tweak if necessary.

The second step is to create an outline for your analysis essay. An outline is the blueprint of your essay, and the structure which holds everything together. Outlining an essay before you begin writing makes the drafting process easier when the time comes.

The outline is a layout of your essay, and a basic one looks like this:

- I. Introduction—the last sentence being a three point thesis.
- II. Body Paragraph # 1—discussing the first point in your thesis.
- III. Body Paragraph # 2—discussing the second point in your thesis.
- IV. Body Paragraph # 3—discussing the third point in your thesis.
- V. Conclusion.

Now, as you write your essay, you may find that you need to expand the outline to fit your needs, and that is perfectly fine. Your outline should also contain reference to any quote or example you want to use as support for your thesis. A more detailed outline example is available for you on your **ArtiosHCS** curriculum website in the **Resources** section.

Unit 8 – Assignments

- Read Unit 8 – Assignment Background.
- Read Chapters XLI, XLII, XLIII XIV, and XV (41, 42, 43, 44, and 45) of *Uncle Tom's Cabin*.
- Compose a rough draft of your literary analysis.

Unit 8 – Assignment Background

It is now time to take the outline you've written and turn that into a rough draft of your essay. If you've created a thorough outline, this process should be a smooth transition. Take the points in your outline and add your background information to the introduction. Next, expand each "main heading" into a paragraph or more.

You may find, as you write, that you need more space than one paragraph to expand on a certain point. That is okay, adjust your outline as you go if need be. This step is easier to accomplish if you already have an outline to work with in the first place. As you write your analysis, use your working thesis as a base, and tweak it if you need to in order to strengthen your paper.

Unit 9 – Assignments

- Using your outline and rough draft, complete a final copy of your literary analysis. Be sure to check your essay against the rubric found on your **ArtiosHCS** curriculum website.



Eliza comes to tell Uncle Tom that he is sold and that she is running away to save her child.

The Artios Home Companion Series

Literature and Composition

Units 10 – 14: Play Writing *A Doll's House*

by Henrik Ibsen
Literature for Units 10 – 14

Over the next five units, the focus will be on Henrik Ibsen's *A Doll's House*, a play which had a great impact on the late nineteenth and early twentieth centuries. This curriculum will cover this one play by Ibsen, but in order to enhance or deepen a study of modern plays, Anton Chekhov's *The Three Sisters* can also be read in conjunction with it. There is a link to Chekhov's play on your **ArtiosHCS** curriculum website. At the end of Unit 14, you will have written your own play based on a theme chosen from *A Doll's House*, but if you choose to read *The Three Sisters* along with Ibsen's work, an alternative assignment would be to write a compare/contrast essay discussing how each author tried to enact change in their societies.

Author Spotlight: Henrik Ibsen

Henrik Ibsen was born in Norway in 1828. He did not have a glamorous life and had to work hard for his success. He wrote many plays that were criticized for their "radical" themes. He is often called the "father of realism." The realistic movement in theater consisted of focusing on regular people with regular problems. Whereas most of the previous theatrical movements focused on royalty or aristocracy, the realistic movement brought theater into the homes of the masses. Ibsen was a huge part of the movement spreading across Europe.

- For more information on **Henrik Ibsen**, please visit the websites found on your **ArtiosHCS** curriculum website for this unit.
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Unit 10 – Assignments

- Unit 10 Assignment Background.
- Read Ibsen's *A Doll's House*, Act I. There are links to the play on your **ArtiosHCS** curriculum website.
- In your Reading Journal answer these questions:
 - What names does Torvold use for Nora? How does this describe their relationship? Do you believe this is a good way to live?
 - What does Nora's careless spending reveal about her character?
 - What struggle can you see in Nora's character? (Think about how she hides her macarons but feels no shame in eating them).
 - What else is Nora hiding from her husband?
 - At the end of the act, Torvold says that lies in a family "corrupt the children." Do you agree? Is Nora justified because her "lie" came from wanting to help her husband?
 - How does the last scene of the act reflect the first scene?
- After you've read Act I, list ways in which a play is different from the poetry and prose read earlier this semester.

Unit 10 – Assignment Background

Similar to Harriett Beecher Stowe, Henrik Ibsen wrote in response to his society. He detested how dependent people had become on cosmetic respectability. A large chunk of European society at that time suggested that as long as a family looked good from the outside that was all that mattered. Ibsen, through the medium of the theater, wrote many controversial plays in which secrets were unearthed (*Ghosts*), one man held to his convictions even when an entire town was against him (*Enemy of the People*), and two people are forced to stop playing at marriage and start living it (*A Doll's House*).

Each of Ibsen's plays was met with both excitement and criticism. *A Doll's House*, which you will be reading for Units 10 & 11, is no exception. In order to understand why it was controversial, you need to have a view of society in that time period.

The place was Germany. The time was late nineteenth century. The society was a patriarchal (male-driven) one. Women, for the most part, did not work to earn a living, but relied on their husbands for financial stability. The home was the woman's domain. It was her responsibility to create an atmosphere of peace and tranquility for her family.

The opening of *A Doll's House* portrays this society perfectly. Nora comes home from shopping and gives a large tip to the porter who helps her carry in a Christmas tree. Her children are with their nanny, and her husband is at work. She has a few moments to herself in which she admires her purchases and sneaks a bite of her favorite treat, macaroons.

Nora and Torvold both put themselves into molds with one another. Their relationship, while sweet on the surface, is shallow. By the end of the play, they are both confronted with their own struggles and have to come to terms with the superficial quality of their marriage.

What made Ibsen's play so controversial was that Nora decides to take matters into her own hands at the end of the play. She decides it is time for her to gain perspective and independence, and the way in which she accomplishes this provided an uproar among audiences.

In fact, because copyright laws were not the same in Germany as in other parts of Europe, when Ibsen's play premiered in other countries, it came with a re-written ending. At first, Ibsen was horrified that they'd tampered with his play, but then he decided to write an alternate ending to the story. If the story had to have a 'happier' ending, then he wanted to be the one to provide it.

As you read the play, imagine being in the society in which this was written. What would your reaction have been to the ending?

Unit 11 – Assignments

- Read Unit 11 – Assignment Background.
- Read *A Doll's House*, Acts II-III.
- In your Reading Journal, answer the following questions:
 - In the opening of Act II, Nora is feeling restless and like her life is in disarray. What about the setting of this scene is a visual clue to those emotions?
 - What purpose does the character of Dr. Rank serve in the story?
 - Why does Nora tell Dr. Rank that she usually avoids the company of the ones she loves?
 - Why does Torvold want to fire Krogstad?
 - Why doesn't Nora listen when Torvold is trying to help her with the tarantella?
 - Why would Mrs. Linde encourage Krogstad to let Torvold find the letter explaining Nora's deception?
 - Torvold says Nora "played with him like a puppet." Considering their relationship to this point, do you believe Torvold is justified in that accusation?
 - What do you think of Nora's decision at the end of the play? Do you believe she was right? What other decisions could she have made in her situation?
 - What is the last sound the audience hears in the play? What emotional impact could this have on an audience?
 - What do you think Ibsen was trying to say with his ending?
- Make a list of possible themes or main ideas Ibsen's work portrays.

Unit 11 – Assignment Background

Over the next four units, you will choose a theme from *A Doll's House* and use that to create your own short play. As was discussed earlier, a play is different from poetry or a novel in the way it is constructed, and how it is received. Reading poetry or prose is a private thing, but theatre is a public medium of art, and therefore must be treated differently.

For more information about the format of a play, please see the "Writing a Play" document on your [ArtiosHCS](#) curriculum website.

There are three main elements each play needs to have. These will be discussed in brief here and elaborated on in later units.

- **Character**—a protagonist and antagonist. Development of these two characters is key for a play to succeed.
- **Conflict**—Something (or someone) needs to be in the way of the protagonist getting what he or she wants. How the characters react or handle the conflict will lead to the resolution of the story.
- **Change**—In order to show the progression of character and conflict, there needs to be a change at the end of the story. This is the resolution of the conflict, and normally shows the protagonist overcoming an obstacle, or gaining new personal insight.

The aim of a stage play is to tell a story through action and dialogue. It is not up to the writer to fill in the thoughts of the characters, nor is it up to the writer to pen paragraph upon paragraph of elaborate setting or character description. The author of a stage play provides the structure of the story, then gets out of the way to let the director and actors bring the story to life.

Because of the nature of the stage play, an author must bring as much life to the story as possible with the dialogue spoken and the action taken.

Think about the first scene of *A Doll's House*. Nora is fussing about like a bird trying to get everything ready. She hides her macaroons and is obviously being careless with her money. Already we get hints of Nora's character, and she hasn't spoken a word. This is story-telling through action.

In the last scene, when Torvold confronts Nora and accuses her of "playing him like a puppet," the dialogue sends a clear message to the audience. Torvold spent most of the play speaking to Nora as if she were a child. He expected her to obey societal norms. His accusation brings to light his character flaws and gives the audience a solid reminder that both of these characters need to mature.

Unit 12 – Assignments

- Read Unit 12 – Assignment Background.
- Choose a theme from *A Doll's House* and write a rough draft of your play. You need to tell a complete story but try to keep the story centered on one day. This will help keep your play focused. Your finished product should be between 7-10 typed pages. Use the "Writing a Play" packet to help you as you compose your rough draft.

Unit 12 – Assignment Background

Character:

For Unit 12 the focus will be on the nature of Character in a stage play. Characters drive the ideas and worldview of stage plays. Authors have a chance, with the character they create, to speak out against a social evil, or to shed light on an issue facing the world today. Characters can be humorous, tragic, and anywhere in between. Compelling characters draw the audience into the world of the play.

A character is only as good as their action and dialogue in a play. Unlike a novel, the audience does not get to spend two hundred plus pages with your character. A playwright needs to establish character motives quickly and accomplish growth or change in around two hours of stage time.

Remember, in a play, dialogue = subtext.

Subtext is what is meant but not said. For example, if a character has a hard time expressing emotion, and are confronted by a confession of love, they won't come out and say, "Um, I have a problem admitting that I'm emotionally connected to people." The exchange could go like this:

- Character A: "I love you."
- Character B: "I think I left the water running in my apartment."
- Character A: "Didn't you hear me?"
- Character B: "... And the electric bill is on my desk..."

While you write your rough draft during Unit 12, focus on bringing your characters to life through their action and their dialogue, and remember to use subtext whenever possible.

Unit 13 – Assignments

- Read Unit 13 – Assignment Background.
- Compose a second draft of your play focusing on the conflict and the change of the story.

Unit 13 – Assignment Background

Now that you’ve spent time developing your characters, it is time to focus on the conflict and change (resolution) within the story.

Conflict:

Each play needs conflict. If there is no conflict, the story is boring because the characters are not challenged, and they cannot grow.

Audiences get to see the true nature of a character when they see how he or she handles conflict. The higher the stakes of the conflict, the more the true nature of the character will be revealed.

Think up a central conflict to your play. How will this conflict reveal the nature of your main character(s)?

Change:

At the end of a stage play, something needs to have upset the status quo, made a character re-think their decisions. This “something” is called change, and often the change or resolution follows directly from the conflict. How the conflict is resolved will determine what sort of change happens in the story. For example, if the conflict in a play is that a secret is being kept, then the change will be that the secret is revealed and what happens after that will determine the ending of the play.

While you compose a second draft of your play, make sure that the conflict has brought about a change by the end of the story.

Unit 14 – Assignments

- Using the information on playwriting you’ve learned over the previous four units, compose a final draft of your play. Make sure you follow the format, and that your work is error free.
- To enhance the experience, grab some friends or classmates and perform your play in front of your parents or teachers. Plays are meant to have an audience!



Nora (played by Vera Komissarzhevskaya) dresses the Christmas tree (1904)

Units 15 – 18: Annotation and Literary Analysis

Animal Farm

by George Orwell

Literature for Units 15 – 18

George Orwell’s classic, *Animal Farm*, is a book which can be appreciated by many people in different walks of life. When first published, the novel could be found in the children’s literature section, much to the chagrin of the author. Orwell did not want his book to be considered a “children’s” story, even though the structure of the novel fits into the structure of fable, allegory, and satire. Orwell’s story mirrored the rise and fall of the 1917 Russian Revolution, but *Animal Farm* is a story packed with lessons that span generations.

The story revolves around a group of farm animals who possess the ability to speak and reason. They have grown discontent with the rule of the humans and stage a revolution in order to gain their freedom. Their success comes at a price when one of the pigs, Napoleon, decides that he should be the supreme ruler of the farm. Napoleon’s rule, while progressive, goes against the original intent of the revolution and the animals question whether they are really better off than they were before.

Throughout the next four units, students will learn how Orwell’s novel fits into the genres of fable, allegory, and satire. They will also track the actions of an animal group from the story. The novel project will be an analysis of the story written in essay form.

- For more information about the 1917 Russian Revolution, please read the article found in your **ArtiosHCS** curriculum website.

Author Spotlight

George Orwell was born in Bengal, India, in 1903. His birth name was Eric Arthur Blair. Because he wanted to protect the reputation of his family, he adopted the pen name “George Orwell” after writing a particularly scathing piece about the working conditions in London. Orwell supported himself through writing for the majority of his adult life. He was never as loyal to England as he was to India and was seen as a radical thinker. His most famous novels, *Animal Farm* and *1984* showed Orwell’s distrust of strict government structure in the world, and his growing unease with the world around him. Orwell contracted tuberculosis and passed away in 1950.

- For more information on **George Orwell**, please visit the websites found on your **ArtiosHCS** curriculum website for this unit.

Unit 15 – Assignments

- Read Unit 15 – Assignment Background.
- Read Chapters 1-4 of *Animal Farm*.
- Write an author profile for George Orwell.
- Choose an animal group to track throughout the story and annotate as you read. Remember to “annotate” a piece of literature means to take a deeper look at a text. Some forms of annotation include: circling new words and defining them in the margin of the text, putting boxes around characters names and writing down some description of the character, and highlighting interesting passages and writing down your thoughts about that particular passage.
- Annotating is a great way to be an “active” reader, one who participates in the reading and who applies their own knowledge to the text. Throughout these units, you will be guided through the process of annotation as it relates to George Orwell’s work.
 - Draw a box around the names of characters that fit into your animal group and write strong descriptions of this animal group in the margins of your book.

- In your reading journal, answer these questions in complete sentences:
 - Where does the group fit socially on the farm?
 - Does the group seem to have any political ambition?
 - Does the group support the animal revolution? How?
- After reading the assignment background, highlight any passages in the first four chapters that you feel fit the genres of: fable, allegory, and satire. Make sure you note in the margin of your book, which genre you feel the passage fits.

Unit 15 – Assignment Background

George Orwell’s novel can be classified as fitting three genres at once: fable, allegory, and satire. In order to understand the depth of Orwell’s work, we need to define and learn more about these three genres.

Fable:

A fable is defined as a “short story, typically written with animals as characters, conveying a moral.” Fables are normally written to present a moral or to highlight the humorous side of society by characterizing certain types of people as animals. In a strict fable the moral lesson, not the plot or characters, is the focus of the story. Aesop’s fables are the most widely known collection of these stories and contains such tales as “The Tortoise and the Hare,” “The Ant and the Grasshopper,” and “The Fox and the Crow.” The animals in the story were given human characteristics in order to highlight the message the author was trying to convey. Sometimes, a message or moral will be accepted into society when it is presented in a way that does not confront the reader but quietly challenges the reader to think about what has happened within the confines of the fable.

George Orwell used the structure of “fable” to amplify the message of his story. The main characters are animals who share some human characteristics such as speech and logical thinking. A main struggle throughout the novel revolves around the idea of “humanity” and what makes a group human. Orwell purposefully created this fable-like structure to encourage people to think deeply about the events of his story.

Allegory:

An allegory is defined as “a story, poem, or picture that can be interpreted to reveal a hidden meaning, typically a moral or political one.” Allegories are also used to convey a spiritual meaning. One of the most famous allegories is *Pilgrim’s Progress* written by John Bunyan. In this allegory, the character of “Christian” must leave behind his town and travel to the “Celestial City.” The story is an allegory, or representation of a believer’s journey from darkness to salvation to eternal life.

In an allegory, character, setting, and events can all have a double meaning. In *Pilgrim’s Progress*, Bunyan uses character names to highlight their personalities, with characters such as “Hopeful,” “Pliable,” and “Christian.” Bunyan also uses plot to strengthen his allegory. Events in the story reflect Biblical accounts, and the entire plot is a mirror image to the Christian walk.

Orwell uses similar techniques in *Animal Farm*. The plot of his story reflects that of the 1917 Russian Revolution with his animal characters acting in ways that their human counterparts did in Russia. The story is also multi-faceted, and mirrors what happens in any society on the brink of war or political upheaval.

Satire:

According to OxfordDictionaries.com, satire is “the use of humor, irony, exaggeration, or ridicule to expose and criticize people’s...vices, particularly in the context of contemporary politics and other topical issues.” Satire can be used in many forms to highlight an issue in society. Many artists believe in the idea of “sweet instruction.” Sweet instruction means that an artist’s views are expressed but in a humorous or lighthearted way. Satire is a form of sweet instruction.

Jane Austen, author of *Pride and Prejudice*, *Sense and Sensibility*, and *Emma* used satire quite often to point out societal stereotypes she faced in her culture. Her characters were exaggerated in order to point out the problem areas of her society. Satire is a powerful tool, which, when used properly, can engage an audience through humor and make them think deeply about the issues raised.

Orwell uses satire through his exaggeration of political stereotypes in *Animal Farm*. Each group of animals is used to represent a political party, social group, or individual. The actions and decisions made by the animal characters is meant to serve as a satirical look at how a society can be swayed through empty promises and harsh enforcement of false leadership.

Unit 16 – Assignments

- Read Chapters 5-7 of *Animal Farm*.

Activity While Reading: focus on the language of the story.

- At times in the story, George Orwell shows that what characters say should not be taken at face value, but other times he only hints that language is being manipulated. While you read, highlight passages that show how language is being twisted to suit the ideals of the animal groups. Write in the margins of your book what is actually being said or hinted at in the passage.
- Underline sentences or phrases that involve the animal group you are tracking. Does your animal group use language to persuade or manipulate the other animals?
- Circle passages that showcase the genres of: fable, allegory, and satire. Make sure you note in the margin of your book which genre you feel the passage best fits.

Unit 17 – Assignments

- Read Chapters 8-10 of *Animal Farm*.
- Underline any passages that deal with your animal group.
- Circle passages that highlight the genres of: fable, allegory, and satire. Make sure you note in the margin of your book the specific genre that you feel the passage best fits.
- This week, your focus will be on the changes Napoleon makes as part of his new regime. In the book, highlight any passages that speak about the changes in the social classes of the animals. Are some animals seen as more perfect than others? Create a chart that shows the difference between the privileges of the pigs versus the privileges of the other animals.
- Answer these questions in your reading journal:
 - What did you think about the end of the story?
 - What do you think will happen to the farm now?
 - How could Napoleon’s plans have been changed?
 - Why was it so easy for Napoleon to enforce his will?

Essay Assignment:

- Using the information gathered in these last three units, compose a five paragraph literary analysis of this book. You may choose one of these topics:
 1. George Orwell wrote his novel to reflect the events that happened in Russia during 1917. In his novel, Orwell chose specific animals to represent specific people, and sometimes entire groups of animals to represent a people group. Using the animal group you have tracked throughout the story, write an essay that details:
 - a. who that animal group was supposed to represent
 - b. how the actions of that animal group influenced others
 - c. how the ending affected the animal group
 2. Write a literary analysis exploring how *Animal Farm* fits one of these genres:
 - a. fable
 - b. allegory
 - c. satire

Unit 18 – Assignments

- Be sure you have completed your reading of *Animal Farm*.
- Using the **Rubric** found in the **Resources** section of your **ArtiosHCS** curriculum website, complete a final draft of your essay.

The Artios Home Companion Series

Literature and Composition

Units 19 – 24: The Research Paper *Works of Poetry from World War I and Speeches from World War II*

Literature for Units 19 – 24

In units 19-24 students will be introduced to works of poetry from World War I and speeches from World War II that shaped the literary field during this time period. At the end of these units, students will have learned how to research a topic, write an essay outline, and compose a research essay based on a topic chosen from the two world wars.

- Optional *Additional Assignment*: After studying the poetry and speeches, students may choose one poem or speech to memorize and present as part of their grade for these next six units.

Unit 19 – Author Spotlight: John McCrae

Lieutenant Colonel **John McCrae** MD was born in 1872 in Canada. He had a head for education and eventually went to medical school, where he paid for his tuition by tutoring other students. Among those he tutored were women that became some of the first female doctors in Ontario. At the start of WWI, the United Kingdom declared war on Germany, and McCrae went to fight in support of the United Kingdom. He was a field surgeon, and his poem “In Flanders Field” became one of the most famous poems of WWI. He died of pneumonia before the end of WWI, but his poem continues to be one of the most influential of the time period.

- For more information on **John McCrae**, please visit the websites found on your **ArtiosHCS** curriculum website for this unit.

Unit 19 – Assignments

- Read “In Flanders Field” by John McCrae.
- Write an Author Profile for John McCrae.
- Read Unit 19 – Assignment Background.
- Below is a list of possible research topics. This is by no means an exhaustive list. You should conduct your own preliminary research on any topics that spark your interest and narrow your choice of topics down to three. You will choose one topic out of these three *after* you’ve done some pre-researching.

Possible Topics: (If you are using this curriculum as part of a class, each student should select a different topic so that you can have a wide variety of subjects to discuss.)

- | | |
|---------------------|---------------------------------------|
| ▪ Bolshevik | ▪ Spartacus Group |
| ▪ Anne Frank | ▪ Weimar Republic |
| ▪ Hugo Haase | ▪ Winston Churchill |
| ▪ John McCrae | ▪ Archduke Franz Ferdinand of Austria |
| ▪ Wilfred Owen | ▪ Social Democratic Party |
| ▪ Kaiser Wilhelm II | ▪ Weapons of World War II |
| ▪ Karl Liebknecht | ▪ The Bombing of Pearl Harbor |
| ▪ Rosa Luxemburg | ▪ The role of submarines in WWII |

Unit 19 – Assignment Background

How to Choose a Research Topic

Sometimes choosing a topic to research can be daunting. There is so much information to choose from, and so many wonderful stories to explore. It is easy to fall into two camps: too broad or too narrow.

- **When a topic is too broad:**

This is the camp where people who cannot decide what to research go to reside. Too many subjects are interesting, so they decide to pick something like “Battles of WWII,” or just simply “World War II.”

Both of these topics are too broad for our purposes because to adequately cover one of those topics would take the length of several books. If a student tried to cover that in a research paper, the paper would be vague and without purpose. The subject is too big to cover in that amount of space, and the paper would not be cohesive because of the amount of information it would need to cover.

If a student were interested in the battles of WWII, then choosing a particular battle, or choosing a related topic such as “living conditions of soldiers on the battlefields in WWII” would narrow the topic down into a manageable size.

- **When a topic is too narrow:**

This is when not enough is known about a topic to construct a research paper. Mostly this occurs when a student tries to research a smaller battle, or a lesser known individual or political movement. The research paper will need several types of sources, and if there is only one book or maybe one website that talks about the topic, then it is too narrow.

The purpose of this unit is to give you time to do some preliminary research on several topics to see if the topics are a good fit for the research paper. Once you’ve found three possible topics, go to the library, research online, and look through periodicals to see if your topic is too broad, too narrow, or a good match for the project.

Unit 20 – Author Spotlight: Wilfred Owen

Wilfred Owen was born in England in 1893. He grew up in England and became interested in poetry when he was 17 years old. He did not attend University, but instead assisted a reverend for a time, then went to teach English in France. He joined the war effort in 1915 but was wounded two years later. He spent some time in recovery where he met several other poets of the time period. Owen constructed most of his poetry within a one year period during the war, and unlike others who chose to Romanticize the battle, Owen tried to show a realistic picture of the war. His poems focus more on the pain of war than anything else. After recovering, Owen rejoined the fight, and he was killed in battle on November 4, 1918.

- For more information on **Wilfred Owen**, please visit the websites found on your **ArtiosHCS** curriculum website for this unit.

Unit 20 – Assignments

- Read Wilfred Owen’s “Dulce et Decorum est” found at a link on your **ArtiosHCS** curriculum website.
- Read Wilfred Owen’s “Anthem for Doomed Youth” found at a link on your **ArtiosHCS** curriculum website.
- Read Unit 20 – Assignment Background.
- Choose a topic for your research paper.
- Find a minimum of 6 sources, with a source card for each one, from at least 3 different types of sources (book, websites, magazine, etc.) and create a minimum of 25 different note cards.

Unit 20 – Assignment Background

In order to research the topic, you should use a combination of print and internet sources to find out as much as you can about the topic you’ve chosen. You may need to go to the library a second time, so give yourself time to do this. As you research, you should write source cards and note cards to keep you organized. Source cards contain the information about the source that you are using (book, periodical, newspaper article, website, interview, etc.). This will include the title of the source, the author, the page number, etc. Note cards contain the information that you gather from the source.

Information on **Note Cards** and **Source Cards** can be found in the **Resources** section of your **ArtiosHCS** curriculum website.

As you look through sources and find information you would like to use in your paper, you should paraphrase (re-write) the information in your own words. Paraphrase information about only one topic on each note card. For instance, if you are researching a person, you would write information on their place of birth on one card, and another card which details their school experience. One good way to do this is to only write notes, rather than full sentences, while you’re researching; then when you return to your notes during the writing phase of this project, you will have forgotten exactly the way it was written and the words that you write will truly be your own. If you copy sentences or paragraphs from a source and do not give credit to that source, that is called plagiarism. While

you are in high school and once you reach college, most teachers and professors will fail your work if it contains any plagiarism.

For a better understanding of plagiarism, see the **Resources** section of your **ArtiosHCS** curriculum website.

Now, you will find that sources contain well written information that you may want to use in your paper. This is where “quoting” comes into play. Quotes from reputable sources make your writing sound more credible and professional, so be looking for solid quotes as you do your research and note taking. Your final paper should contain at least 5, but no more than 7, quotes from sources. You should use quotation marks around any quote that you use word for word from your source. If there are not quotation marks around the information on your note card, it will be assumed that this information is paraphrased. Make sure that each quote is on its own note card.

One more note on sources: there is a lot of debate in the education world about whether or not **Wikipedia.org** should be accepted as a source. For the purpose of this research paper, Wikipedia.org will NOT count as a source. Here’s a hint, though, if you find an article that you’d like to use on Wikipedia, scroll to the bottom of the page and find the links to the “References” used within the article; these will frequently make for more solid sources.

Unit 21 – Author Spotlight: Winston Churchill

Sir **Winston Churchill** was born in England in 1874. He grew up in a life of privilege, with his father being a Lord, and his mother being an American aristocrat. He was very bright but did not perform well in school, and instead of going to university, he went to a military academy. Winston Churchill dedicated his life to the advancement of his people. He eventually rose through the ranks to become the Prime Minister of Britain and led the country through WWII. In later years he became Prime Minister for another term and was knighted by Queen Elizabeth in 1953. He retired from politics in 1954 and passed away one year later, but his memory and legacy are still strong today.

- For more information on **Winston Churchill**, please visit the websites found on your **ArtiosHCS** curriculum website for this unit.

Unit 21 – Assignments

- Read the WWII speeches by Winston Churchill found at the links on your **ArtiosHCS** curriculum website.
- Read Unit 21 – Assignment Background.
- Create an outline for your research paper.

Unit 21 – Assignment Background

Now that you have completed your note cards, you will organize them in order to create an outline. An outline is an organizational tool used by writers to help them keep track of their material, and it will help you stay focused when you begin writing your research paper. An outline is constructed of main ideas and subtopics, and uses Roman numerals, letters, and numbers to help create order. For your outline, you will use phrases, not complete sentences for each main idea, subtopic, and supporting detail.

In order to create an outline, start by arranging your note cards into groups (information that goes together or builds off one another) to help you decide the most important information that will go into your paper. For example, if you are researching the life of a person, your first topic could be their childhood, your second main topic could be their involvement in the war, and your third topic could be their life after the war, or the legacy they left behind. Arrange your notecards into those different “categories” and then build from there.

You may find that there are some note cards that don’t fit into any category of your paper, and it’s okay to eliminate some of them.

You should include as many main topics as you need to cover to thoroughly analyze your topic. Below you will find an example of an outline:

TITLE OF YOUR PIECE

I. Introduction - First Main Topic

A. Subtopic

1. Supporting detail for Subtopic A
2. Supporting detail for Subtopic A

- B. Subtopic
 - 1. Supporting detail for Subtopic B
 - 2. Supporting detail for Subtopic B
- C. Subtopic
 - 1. Supporting detail for Subtopic C
 - 2. Supporting detail for Subtopic C
- II. Second Main Topic
 - A. Subtopic
 - 1. Supporting detail for Subtopic A
 - 2. Supporting detail for Subtopic A
 - B. Subtopic
 - 1. Supporting detail for Subtopic B
 - 2. Supporting detail for Subtopic B
 - C. Subtopic
 - 1. Supporting detail for Subtopic C
 - 2. Supporting detail for Subtopic C
- III. Third Main Topic
 - A. Subtopic
 - 1. Supporting detail for Subtopic A
 - 2. Supporting detail for Subtopic A
 - B. Subtopic
 - 1. Supporting detail for Subtopic B
 - 2. Supporting detail for Subtopic B
 - C. Subtopic
 - 1. Supporting detail for Subtopic C
 - 2. Supporting detail for Subtopic C

Unit 22 – Assignments

- Read Unit 22 – Assignment Background.
- Create a rough draft of your essay to turn in. For classroom use: this rough draft will be reviewed by at least two peers and will be returned to the student for use in constructing a final draft.
 - It is strongly recommended that the rough draft be reviewed by at least two different individuals and checked against the **Essay Rubric** found in the **Resources** section of your **ArtiosHCS** curriculum website before proceeding to the first and final drafts of the paper.

Unit 22 – Assignment Background

The rough draft of the paper should be handwritten, even though the final draft will be typed. Each one of your subtopics should become at least one paragraph, and you should have a minimum of twelve paragraphs when you are finished. Your final paper will be 5-7 pages in length, so plan accordingly.

- Make sure your note cards are organized in the order that the information appears in your paper.
- Work through the writing of your rough draft by following your outline and referring to the information in your organized note cards. You will not be able to just copy the note cards in order; you will need to fit your information together so that the information is presented in a natural way. Remember to use at least five quotes.
- When using quotes, be sure to cite your sources through the use of parenthetical (or in-text) citations. This means to include information after a quote so that the reader knows where you've gotten your information. For example, here is a quote taken from *My Brother's Shadow* by *Monika Schroeder*. If you were to use the quote, you should cite it in the paper:
 - “A woman walks by with a small child on each hand. All three of them look gaunt, their eyes underlined by purplish rings, their cheeks hollow” (*Schroeder 2*).
- Paraphrases should also be cited. When you rewrite information from a specific source in your own words, you still need to credit that source. Paraphrasing is not just a rearrangement of an author's words, but a restating of the information in your own words. You want to be sure to give that source credit for the information.
- More information on parenthetical citations can be found in your **ArtiosHCS** curriculum website in the **Resources** section.

Unit 23 – Assignments

- Create a first draft of your research paper. A first draft should be an improvement on your rough draft. It is not the final draft of the paper. For classroom use, the teacher will review this first draft. Students will have an opportunity to write a final draft before receiving a final grade for the research paper.
- Review your first draft and correct any errors. Make sure all of your sources are cited in text. Also, look for places where you can add more descriptive language, or add some more detail to a point.
- At the end of your first draft, create a bibliography or “works cited” page. This bibliography is a list of all the sources you used to create your paper. Each type of source (book, magazine, and website) has a different format in which it should be listed. Visit your **ArtiosHCS** curriculum website and look under **Resources** for information about how to properly list each type of source.

Unit 24 – Assignments

- Using the edited first draft as a guide, correct any errors in the essay or the bibliography and construct the final draft of your research paper.
- When you turn in your final draft, make sure you include a cover page and page numbers.
 - A sample cover page can be found in the **Resources** section of your **ArtiosHCS** curriculum website.
- Staple together a blank **Rubric**, your outline, your first draft along with your final research paper and turn them in.



Aspects of the poem “In Flanders Fields” were used in propaganda, such as this Canadian war bonds poster.

Units 25 – 28: The Personal Essay
Out of the Silent Planet

by C.S. Lewis
Literature for Units 25 – 28

Units 25-28 will focus on *Out of the Silent Planet* by C.S. Lewis. The story revolves around Dr. Ransom, who, while on holiday in England, runs into an old school chum of his and ends up being kidnapped and taken via spaceship to the planet Malacandra. Here Ransom must choose between a life he's always known and a new interpretation of his home planet. This is the first of the C.S. Lewis Space Trilogy, and marks Lewis' venture from fantasy into science fiction.

Out of the Silent Planet, like Lewis's *Chronicles of Narnia* series, presents readers with an allegory. The origin of mankind, the nature of sin, and the promise of redemption are shown through the exploration of far off planets, majestic alien species, and one man's journey to an open heart.

Lewis, famous for his allegorical children's stories, wrote this science fiction trilogy as a reaction to the limited amount of decent fiction on the shelves. He wanted to create an alternative that captured the attention of readers but also caused them to question their society and look towards God for the answers. This curriculum only covers the first book in the trilogy, but students are strongly encouraged to read the other two books in the series in order to have a strong perspective of the scope of Lewis' storytelling.

While studying this novel, students will be asked to write personal reflections on the story, and the ending project will be the composition of a personal essay.

Optional *Additional Assignment*: One of the most compelling elements of this story is the imagery Lewis brings to the page. As a response to the story, students should create a piece of visual art (photograph, video, painting, etc.) that reflects a theme of the story, or that shows their favorite scene in the story.

Author Spotlight: C.S. Lewis

Clive Staples Lewis was born in Belfast, Ireland, in 1898. He lost his mother when he was only 10 years old, but was very close with his older brother Warren. Lewis graduated from Oxford University with a focus in two areas: literature and philosophy. He served in WWI, but was sent home after being wounded. After the war, he became a professor and joined a group of writers known as the Inklings. These men and women would meet and discuss literature, philosophy, and religion. It was through the influence of this group, particularly his friend J.R.R. Tolkien, that Lewis became a Christian, and devoted his life to writing apologetic texts in favor of Christianity. Lewis married once, but his wife passed away due to cancer after only four years of marriage. He continued to teach, write, and grow in faith until 1963 when he passed away just before his sixty-fifth birthday. His literary works continue to inspire faith and creativity to this day.

- For more information on **C.S. Lewis**, please visit the websites found on your ArtiosHCS curriculum website for this unit.

Unit 25 – Assignments

- Read Unit 25 – Assignment Background.
- Write an author profile on C.S. Lewis.
- Read Chapters 1-9 in *Out of the Silent Planet*.
- In your reading journal, answer these questions. Remember to use complete sentences
 - Who is the Pedestrian at the beginning of the story? What do you know about him from the first page alone?
 - What are the motives of Devine and Watson? What does each man want from their journey?
 - Why are Devine and Watson dulled to the beauty and mystery of Malacandra?
 - How does Ransom escape?
 - Who are the *hross*? Describe them.

- Choose a scene from the story and re-write it as if you were the main character. Explain how you feel, what you see, what you smell, taste, hear, etc. Try to engage all five senses in this exercise. Do not simply copy the emotions that Lewis wrote down, but try to imagine yourself in that scene and journal about that. You could write from the perspective of a human, or you could choose to write from the perspective of one of the natives of Malacandra.

Unit 25 – Assignment Background

C.S. Lewis, although famous for his fiction, was also well known for his nonfiction. He wrote many books on theology, the nature of love, and the pain of grief. Many of these non-fictional works were quite personal for Lewis. He was vulnerable with the reader and through his writing, worked through many difficult ideas and times in his life. Even his fiction contains an element of the realistic. Many of the nonfiction essays can be classified as personal essays. A personal essay is a chance for the writer to tell their own story in a structured way. It is helpful for the writer and the reader to be able to see a personal journey written out clearly.

The Personal Essay

A personal essay has a specific structure that we will go through in the coming weeks.

- The **first** thing you need to know is the format. Let’s review the structure of a “five paragraph essay” form that includes a thesis, supporting points, and a conclusion.
 - Paragraph One: Introduction—gives an overview of what a reader can expect to find in the essay. This paragraph ends with a thesis statement.
 - Paragraphs Two-Four: Body Paragraphs—give support for the thesis statement. The essay should flow smoothly from one paragraph to the next through the use of transitions.
 - Paragraph Five: Conclusion—brings the essay back to the main point and wraps up the support the author has given.
- The **second** thing would be to choose a topic and work on a main idea or “thesis.”

Remember—the thesis statement comes at the end of the introductory paragraph, so it must tie together the entire paper in just one sentence.

A good way to construct a strong thesis would be to use the “three part” method. In order to construct a three part thesis, you must first have a topic, and then you need to come up with three points to support your topic. (This is often called the “how, what, and why” of the thesis.)

- *Examples:*

“Participating in the fine arts can be helpful for a student’s emotional development.”

This is a good statement, but it has nothing to back it up. A good thesis needs support. If we add the three part thesis method:

“Participating in the fine arts can be helpful for a student’s emotional development because it promotes teamwork, supports communication, and encourages the use of imagination.”

Now we’re talking! We have a thesis which is supported by three points. These three points will serve as the basis for our body paragraphs, and will give the essay a strong foundation.

Please note: The structure of a personal essay will contain a bit more fluidity than a research essay. Your paper will probably have more than five paragraphs, and you are allowed to use the pronoun “I.”

Unit 26 – Assignments

- Read Chapters 10-17 in *Out of the Silent Planet*.
- Read Unit 26 – Assignment Background

Activity While Reading: Answer the discussion questions below in your reading journal. Be sure to use complete sentences and check for correct grammar, punctuation, and spelling.

• Discussion Questions

1. How does Ransom begin to communicate with the *hross*? Why does he spend so much time learning their culture? What does this say about his character?
2. What are the *eldil*? What do they look like?

3. Ransom was summoned to Oyarsa, but did not go at first. What was the consequence of that decision?
 4. Who brings Ransom to Oyarsa? Why is this significant?
 5. Who is Oyarsa? Why is this character important to the story?
- Choose a topic for your personal essay and begin the drafting process. This topic should be focused on a time in your life when you have overcome a challenge, God has shown you a new facet of Himself, or when you faced a problem.

Unit 26 – Assignment Background

The Drafting Process:

The structure of an essay is straightforward, but it is only a structure, a guide. Yes, you need a strong thesis and yes, you need to support your thoughts, but you also need to engage with the material in order to draw in your reader.

Personal essays can be one of the most beautiful types of essay writing, or they can be sloppy, over-emotional, and vague.

A personal essay has two parts: what the essay says, and what the essay is about.

- What the essay says:

This refers to the words on the page. An essay could explore a time when a person learns a new skill such as riding a bike, rock climbing, baking, or any host of activities. The words on the page detail the event and how the writer felt at the time of the event.

- What the essay is about:

This refers to the subtext, or what is not on the page. This is the second layer of the personal essay and the touch that will make the essay stand out.

Let's say, for example, that someone was writing an essay about how they learned to ride a bike. Maybe they were younger, or maybe they learned as an adult. What's on the page is the experience they had with bike riding, but what's not on the page - what could be put in as subtext - is how that individual was able to conquer a fear, or how the experience of learning that new skill helped them to explore other new skills. It is usually up to the writer how much subtext will go into the essay, but there should be some to give the essay that "layered" feel. As you think of topics, think about what subtext can be woven into the essay.

Unit 27 – Assignments

- Read Chapter 19 – Postscript in *Out of the Silent Planet*.

Activity While Reading: Answer the discussion questions below in your reading journal. Be sure to use complete sentences and check for correct grammar, punctuation, and spelling.

• Discussion Questions

1. Why does Oyarsa say that Weston is loyal only to the "seed" of mankind?
 2. Why does Oyarsa have mercy on the humans?
 3. What does it mean to be "bent" in this story?
 4. Why is earth referred to as the "silent planet"?
 5. Does Ransom return to earth? Why or why not?
 6. This story is allegorical. Choose at least two different elements of the story and explain how they make up an allegory.
- Using the **rubric** found in the **Resources** section of your **ArtiosHCS** curriculum website, compose a rough draft of your personal essay.

Unit 28 – Assignments

- Be sure you have completed reading *Out of the Silent Planet*.
- Using the **Rubric** found in the **Resources** section of your **ArtiosHCS** curriculum website, check your rough draft and make sure you have met all the requirements, then edit and turn in the final copy of your personal essay.