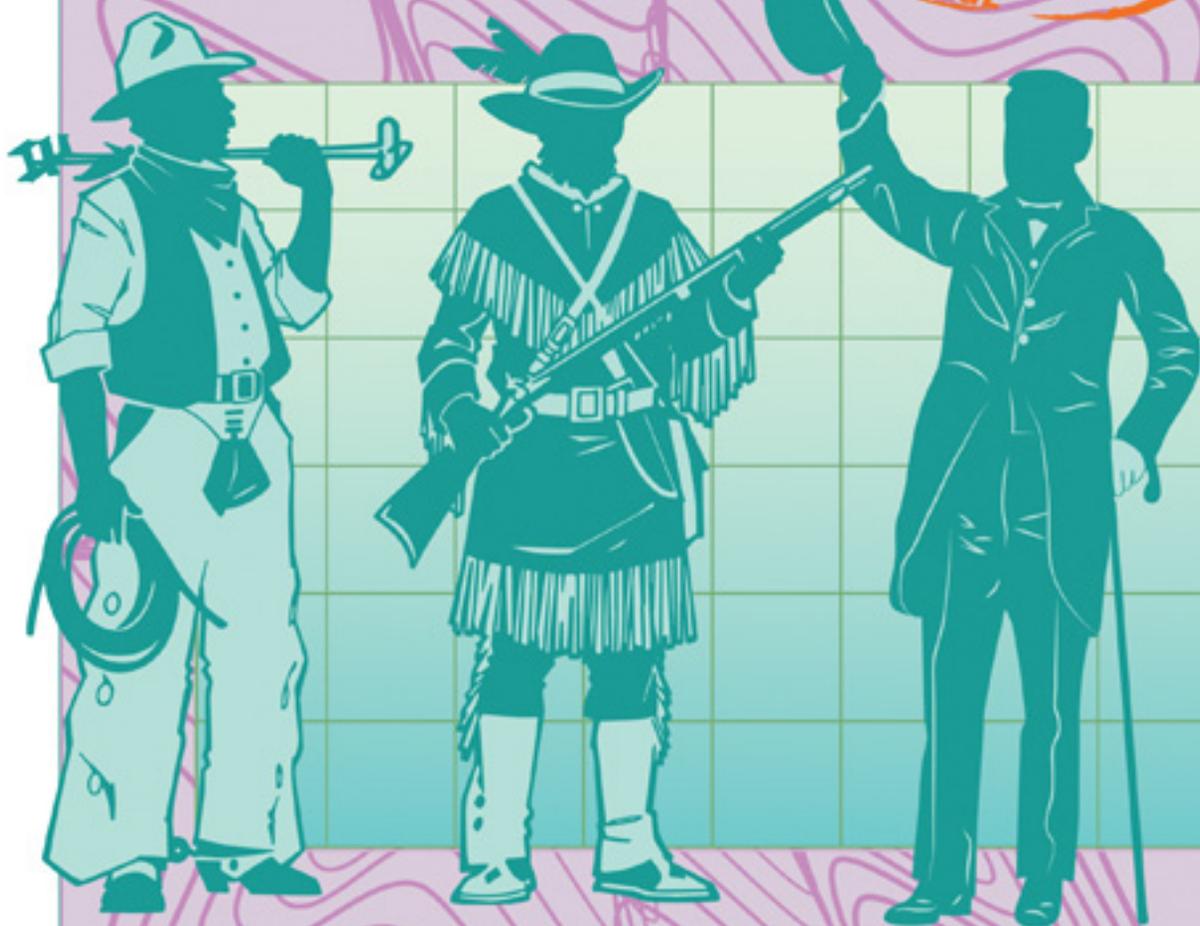


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# AMERICAN HISTORY ACTIVATORS

EARLY  
NINETEENTH CENTURY  
THROUGH  
THE INDUSTRIAL  
AGE



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# American History Activators

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Early Nineteenth Century through the Industrial Age

By Bill Lacey



CULVER CITY, CALIFORNIA



Bill Lacey, who wrote most of the American History Activators, has written for Interact since 1974—over 40 years! During these years, he counts among his favorite publications, as author and/or co-author, *Greeks, Civil War, Patriots, Bones & Stones, Vietnam, and Alamo*. After earning a master's degree in history from the University of Southern California, Bill taught for thirty-six years in public schools in southern California and for one year (1970–1971) in London, U.K. His other pursuits include playing golf, supervising student teachers for the CSU system, and helping to raise his eight grandchildren with his wife Barbara, also an Interact author and Bill's indispensable editor and advisor.

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# Welcome to American History Activators

## Early Nineteenth Century through the Industrial Age

Immerse students in living history as you introduce eight major milestones in American history. Whether used as lead-ins to upcoming lessons or as wrap-up activities, these mini-simulations provide your students with experiences that will shape their historical perceptions and positively enhance their understanding of past, current, and future events. Each of the eight units is brief, requires little preparation, and includes a ready-to-use lesson, background essay, narration, and postscript. Each unit concludes with a corresponding Common Core–based historical investigation activity, which utilizes students’ historical thinking skills and provides a driving question with primary and secondary sources for analysis.



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# Introduction

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## **Purpose**

These simple-to-use Activators supplement your U.S. History classes and immerse your students in “living history” situations. Students get up from their desks, move around in different classroom configurations, and find themselves drawn into history that becomes compellingly real. For a variety of reasons, students seem to function better and learn more when actively engaged. American History Activators provide brief, clever, and exciting experiences for your students.

## **What Are Activators?**

Activators possess three common elements, which embody a philosophical foundation.

1. Activators are simple and brief and require little background reading or preparation. Most Activators take one to two class periods.
2. Duplication requirements are minimal. Brief essays read and visual schematics displayed can provide all the background information students need.
3. Activators involve most, if not all, of your students, even those of limited English fluency.

## **Special Lessons**

American History Activators provide experiences that shape students’ historical perceptions and positively enhance their understanding of past, current, and future events. As you introduce the units to your students, help them to understand that we re-create history because doing so has an inherent value.

- **Be Prepared.** Be sure to read the **Setup, Directions,** and **Lesson Plan** options thoroughly before introducing the Activator to your students. Enlist students’ help in setting the scene within the classroom.
- **Reinforce Student Response.** During the action of an Activator, your students are involved in issues and events. When students make personal comments, either in class or during the **Debriefing,** praise them for their astute remarks. Your reinforcement of their experiences emphasizes for all students that history is real because it touches them. Above all, express your pleasure that students are so involved.



### **Teaching tip**

Every student in your class will be standing, walking, marching, crawling, lying down, negotiating, plotting, and perhaps even “flying” as participants at crucial turning points in the development of our country.



### **Teaching tip**

An Activator provides memorable experiences that your students will retain long after other school events fade.

### ***Activating History***

Lessons in the traditional social studies classroom embody mainly visual and auditory learning. However, many students learn more effectively in kinesthetic situations. Activators emphasize the use of body movement, or the kinesthetic learning style often seen in skilled athletes, dancers, and actors. Perhaps students respond so positively and energetically to classes in physical education, shop, art, or home economics, not to mention extracurricular activities, because they can move around and socialize as they learn. Kinesthetic learning can be underutilized in social studies, yet this form of active learning generates highly effective and often indelible lessons.

### ***Ability Levels***

Activators are appropriate to use for various grade and ability levels and appeal to a wide variety of student learning styles. Activators follow the thesis: "Keep it simple and get kids up and moving."

**Gifted Students.** Most gifted students love to play roles. They will probably ad lib dialogue with great success. Some gifted students are natural directors.

**Drama Students.** Tap your drama students to play the pivotal roles. Allow them time to rehearse, and document the performance by filming it.

**Middle School Students.** Spend some time before and after the action of the Activator explaining the whys of the event dramatized. Also, it is suggested that you tap your best and brightest to perform the key roles.

**Lower Ability and Limited English Students.** These two groups of students appreciate and respond well to the kinesthetic learning of Activators. Rehearse two or more times. Do not proceed with the action of the Activator until everyone knows exactly what will occur and when.

### ***Grouping Students***

Activators promote the concept of "students as workers and teachers as managers and facilitators." Activators allow students to participate in their learning in ways that are often unfamiliar to them. Consider the following when planning the action of an Activator:

- **Student Directors.** You may select four or five student directors early in the school year to rotate responsibilities for a series of Activators. Allow each director three or four days to prepare for his or her Activator. Meet with the cadre before and after the action of the first Activator. Review your standards and expectations for the Activators. Grant enough latitude so they may apply their talents—and their time—fully.
- **Small Group Responsibility.** Divide your students into six groups of five or six. Put each group in charge of an Activator scheduled during

the academic year. Allow each group three or four days to prepare for their Activator. Meet with the class before and after the action of the first Activator. Review your standards and expectations for the Activators. Select, or allow each group to select, the director.

### ***Time Allotment***

Activators vary somewhat in length—from one to two or more class periods, depending on the extent of your preparations and **Debriefing**. Other variables include class ability, grade level, the Activator itself, which **Lesson Plan** option you choose to use, and time for rehearsals. Whatever you decide, Activator lessons are worth the time spent and pay dividends later.

### ***Room Arrangement***

Most Activators require that you move your classroom furniture around to accommodate the action. Experience proves that changing the room's configuration offers students a fresh perspective and provides a welcome change to the daily routine. If you are a teacher who uses cooperative learning teams, your students are probably veteran furniture movers. Project the provided **Schematic** as a guide, and have students quickly move the desks, tables, and chairs.

### ***Teaching Options***

Most Activators include two or more options for how to conduct each **Lesson Plan**. Study the options carefully, and decide which one or combination will work best with your students, time constraints, classroom configuration, and administrative support.

### ***Debriefing***

A debriefing discussion of the action of the Activator is crucial to help students place the Activator lesson in the context of your course content and to ensure that they grasp the relevance of their experiences. Each Activator includes short and long debriefing suggestions. Study these options carefully and select one or more that reinforce your teaching objectives, or develop your own debriefing topics.

- Consider dividing your class into cooperative learning groups to sort out the debriefing points you decide are appropriate. Take into account individual ability, gender balance, maturity, and ethnic diversity in setting up these groups.
- For closure to the Activator lesson, an essay encompassing the event would be appropriate.

### ***Learning Logs***

A **Learning Log** is a special section of students' notebooks. Teachers using the Learning Log process in their classes often set aside five minutes at the end of certain—sometimes all—class periods.

- Students may write down exactly what happened in class, what they specifically did, and how they felt about what happened.
- Students may write in response to a writing prompt that you devise or that is provided in the **Debriefing**.

### ***Visual History***

Note the suggestions found in the **Resources to consult** section of the **Lesson Plan**. Commercial films or television programs sometimes include memorable scenes re-created from history. Even without an overall story line, these scenes can effectively communicate complex and compelling history. When you know of such a scene in a film or documentary, consider obtaining the film and sharing the experience with your students. Limit the time involved to less than 15 minutes.

### ***Flourishes***

Activators themselves might be considered flourishes that supplement regular classroom lectures and reading. Yet, additional touches can enhance each Activator **Lesson Plan**. Students tend to forget most of what we think are teacher gems; instead they latch onto some strange and clever magical moments. Consider the following suggestions:

1. Find some music representative of the historical era to play as the students arrange the classroom for the action of the Activator.
2. Provide a glossary of words from the **Background Essay**, the **Narration**, or the **Postscript**. Ask for definitions after the activity.
3. If you have time, you or your students may create some historical ambiance with posters or graphics.
4. Assign one group to create an alternative scenario based on the events of the Activator.
  - Assume the opposite happened (e.g., the United States lost the War of 1812, the Rough Riders were never formed, etc.).
  - Change history and explore a series of “what ifs?”
  - Require that students present a different version of the **Postscript**.

5. If possible, dim the lights and use a bright light source—like a spotlight—to focus on the main participants during the action. Later, focus the light on the individual history-makers as you read and discuss the **Postscript**.
6. Find images dealing with the event in books or on the Internet and project five to ten of these during the **Debriefing**.

### ***Evaluation***

Although your students may expect to earn incentive certificates, classroom money, or grades, it is suggested that you focus on these subtler means of assessing student achievements:

- **Comments during Debriefing.** When your students make personal comments during the **Debriefing** about their anger, compassion, or perception, other students will hear and usually respond. History becomes immediate and personal, not distant and impersonal.
- **Learning Logs.** Require, or make it an extra-credit option, that students write in their Learning Logs at the end of each Activator experience.

### ***When to Use Activators***

Many experts in educational motivation believe that enrichment or experiential activity should happen after students study and “master” the material. Others believe that enrichment activity can be an effective motivator, stimulating students’ interest and generating enthusiasm prior to introducing material.

Every lesson presents its own demands for the appropriate dramatic and relevant moment for introducing a related Activator. Some Activators serve as review units to sum up major events of a particular historical era. Other Activators serve to crystallize national or individual motivations that had a significant impact on the historical era.

In any case, these simple and easy-to-use American History Activators will spark your other lessons, enthuse your students, and break up the routine of an academic classroom without requiring a large commitment of your preparation time or actual classroom time.

### ***Historical Investigation Activities***

This last component affords opportunities for students to utilize historical thinking skills—as part of the Common Core State Standards (CCSS)—and is an excellent way to fashion an appropriate and effective closer to each Activator. You will find at the end of each Activator a **Historical Investigation Activity** lesson that requires your students to become history detectives, sorting out facts and points of view from brief but

carefully selected primary- and secondary-source documents. A **Focus Question** drives student inquiry (e.g., “How were cowboys portrayed by themselves and by contemporaries in the late nineteenth century?”).

This valuable coda to the Activators allows you and your students to go beyond textbooks and the short essays and dramatizations of events by examining the “raw materials” of history. Examining the documents, students delve into thought-provoking controversies and at the same time sharpen the tools that are the staples of historical investigation: evaluating evidence and making well-reasoned arguments while drawing conclusions about events in U.S. history.

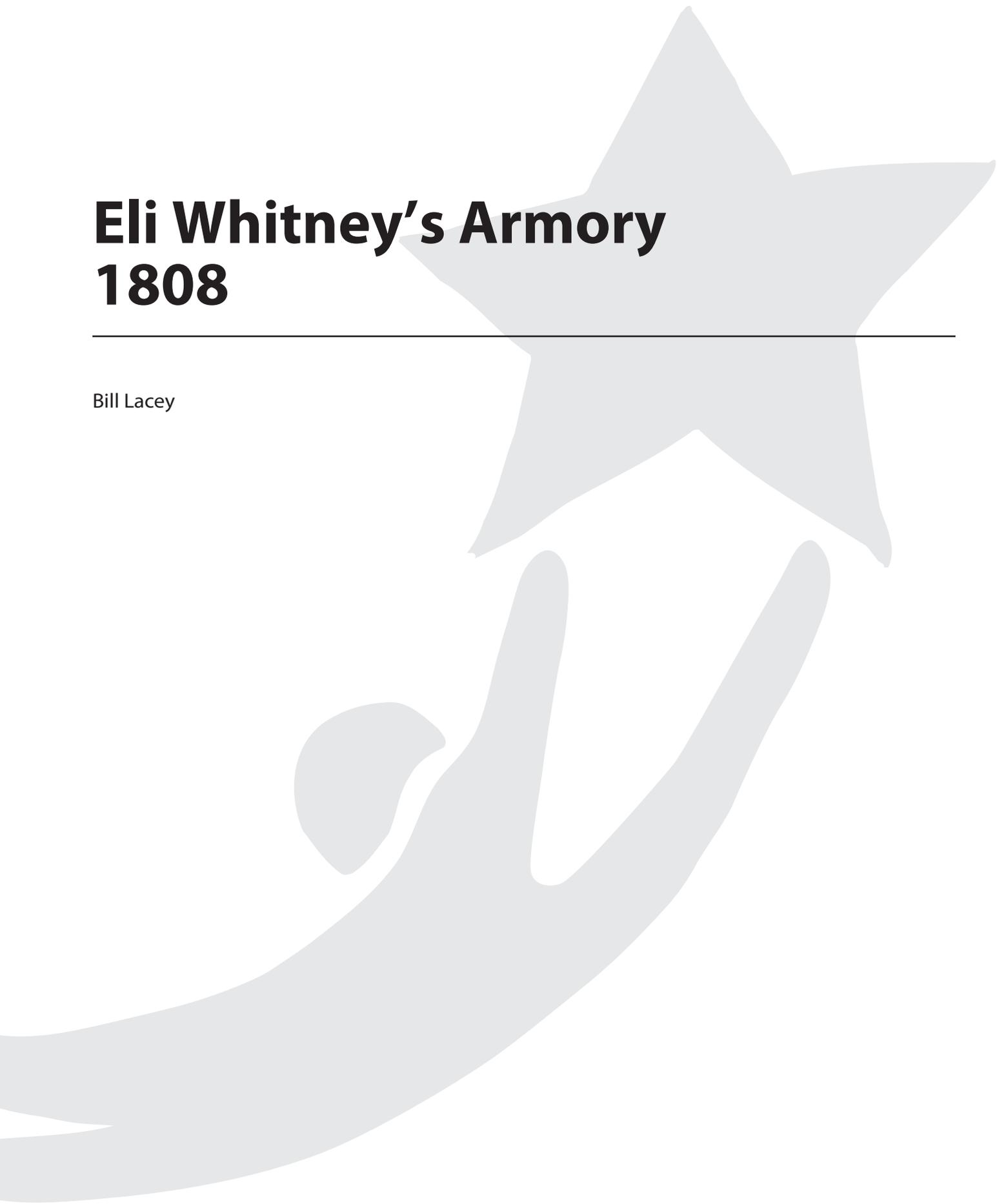
By reading like historians through letters, speeches, diaries, communiqués, etc., students confront a “rich diet” of conflicting interpretations in sources that can only help advance their literacy and promote healthy skepticism. Hopefully, this practice will generate a set of transferable critical-thinking skills for students, who by using these skills, will be able to withstand the ploys of the various “snake-oil salesmen” they will encounter throughout their lives.

# **Eli Whitney's Armory**

## **1808**

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Bill Lacey



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## Lesson Plan

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### Overview

Few would deny that gunpowder, the printing press, the airplane, television, personal computers, and smart phones, among many other inventions, changed history and our lives. Two other transformative inventions—at least for the United States—were the cotton gin and the development of interchangeable parts, both of which are attributed to American gadgeteer Eli Whitney, a Yale-educated Yankee who helped launch the early Industrial Revolution in the United States.

It is now 1808 and panic and stress have hit Whitney's armory in New Haven, Connecticut. According to his ambitious contract with the U.S. Army, signed years before, Whitney's armory must mass-produce ten thousand muskets, but, unfortunately, production is way behind schedule.

Whitney is depending on your students to fulfill his government contract by working feverishly on the line in his armory-factory to assemble these muskets using mass-produced identical parts. Under the watchful eye of armory management, your student "mechanics" will have to work hard and fast to please the "boss" with superior muskets at the end of the assembly line.

### Setup

#### 1. Duplication

- **Background Essay**—*class set*
- **Postscript**—*class set*
- **Inside the Armory**—*one copy* to read aloud
- **Prototype Musket**—*20 copies* to distribute along both assembly lines so workers can view the completed musket
- **Musket Outline**—*about 30–40 of each page* (15–20 for each line to "assemble"). Suggestion: Find used paper and print these on the blank side.
- **Musket Parts**—*10 copies of each page* distributed along both assembly lines so workers can memorize their individual drawing tasks.

2. **Schematic, costumes, props:** Carefully scrutinize the **Schematic** page and note that it calls for a different configuration of desks—essentially two lines of workers with room for supervisors to go up and down the lines to cheer their teams on. No costumes or props are necessary

unless you want to display some signs, placards, or banners (e.g., WHITNEY'S ARMORY).

### 3. Roles

- a. There are only armory workers and a few supervisors along the assembly line in this Activator. This activity accommodates mainstreamed and special needs students since it requires small, easy, repetitive tasks. Therefore, any of your students can be a supervisor or worker.
- b. This Activator might benefit from assembly-line competition.
- c. The supervisors, as a flourish, might walk up and down their lines with clipboards and stopwatches (even though the latter had not been invented yet).

## Directions

1. Either hand out the **Background Essay** as homework the day before class or pass it out now. If you have assigned it as homework, conduct an informal discussion of the main points. If you are passing it out now, have students read it silently before prompting the discussion.
2. Rearrange the room according to the **Schematic** if you are implementing **Option A**. **Option B** requires one long assembly line.
3. Select those students who will act as supervisors and quality checkers. Give them a day to find clipboards and stopwatches.

You have at least two different ways you can conduct this Activator:

### Option A

1. Establish two competing assembly lines.
2. Display the **Prototype Musket** page to further explain the activity.
3. Point out the responsibilities of each worker and the supervisors. The idea is to produce as many muskets as possible, using the division-of-labor and interchangeability-of-parts concepts in an assembly-line format. Students will draw/trace only their specific musket part over and over—one single step each—until the muskets are completed at the end of the line.
4. Have students sit along the assembly line with several **Prototype Musket** sheets distributed along the line to help students focus on their tasks.

5. Give students a time limit to produce as many weapons as they can, with quality of product equal to speed.
6. As a dress rehearsal, send one **Musket Outline** down through the lines to see if students fully understand the process and their role in it.
7. Once you are satisfied, start the production. Tell the workers (armorers) at the end of the line to be patient. Work will come.
8. Option: Stop the process after five minutes to check on the quality of the muskets completed and adjust the work being done.
9. After the allotted time, stop the line and collect the finished pages. Go over the finished products. Comment on their quality and how many were produced. Will Mr. Whitney be pleased?
10. As a flourish: At the end, instead of sending the last several **Musket Outlines** down the line, send five or six blank pieces of paper. See if the quality diminishes!

### Option B

1. There is only one assembly line producing perhaps twenty muskets, with one or two supervisors and no team competition.

### Debriefing

Decide whether you want to use a short or long debriefing. Here are some possible ways to make meaningful what happened during this Activator:

#### Short Debriefing

1. Pass out the **Postscript**. Either read this to students or summarize the main points of each paragraph.
2. Ask students what they learned about Whitney, the armory, the early American Industrial Revolution, interchangeability of parts, division of labor, and working on an assembly line producing muskets for the army.
3. Consider having students write a Learning Log entry as a wrap-up to this Activator.

#### Long Debriefing

Use one or more of the following debriefing activities:

1. Pass out the **Postscript**. Either read this to students or summarize the main points of each paragraph in a brief lecture.

2. Compare the quality of the muskets produced during the Activator—early, middle, and late examples of their work (and a few of the blank, non-outlined ones). Point out the differences and ask students why they're different.
3. Display **Inside the Armory** and either read it to students or summarize its main points. Point out how different the reality of working in Whitney's armory is from the Activator's simulation of producing army muskets. Ask students why we should simulate history, if reality is so unlike the activity we experienced. In short, what positives are there in simulating history?
4. There are many critics of Eli Whitney. Some say that, except for inventing the cotton gin, he contributed very little to the early American Industrial Revolution—that there were others, especially in Europe, who preceded him in instituting interchangeable parts, division of labor, and assembly-line production of firearms. He left his armories for months to settle lawsuits about his cotton gin and this bogged down efforts to fulfill his ambitious production of muskets. (His contract with the U.S. government was finally fulfilled in 1809—almost ten years after the contract's deadline.) One critic in particular, historian Robert Woodbury, has written that the legend of Eli Whitney is full of exaggerations; that Whitney, with no gunsmithing experience, chose to make muskets because he was in debt from cotton gin lawsuits; and that Whitney himself created his own inflated image and place in history that has endured for two centuries. **Ask students:** Is it proper for historians to investigate "legends" like Whitney and find flaws and faults that tear down their images that time has glorified? Is it the historian's duty? Is historical accuracy and truth always a goal—even several generations later?
5. Using the T-chart below, have students debate the positives and negatives of working on a factory assembly line:

Positives	Negatives

6. Ask, "In one sentence, how would you sum up Whitney's overall contribution to American history?" Discuss with students.
7. Consider having students write a Learning Log entry about their experience in this Activator.

## Resources to consult

Bagley, Katie. *Eli Whitney: American Inventor*. Mankato, MN: Bridgestone Books, 2003.

Green, Constance McLaughlin. *Eli Whitney and the Birth of American Technology*. New York: Longman, 1956.

Latham, Jean Lee. *The Story of Eli Whitney*. New York: Harper and Row, 1953

Mirsky, Jeannette, and Allan Nevins. *The World of Eli Whitney*. New York: Macmillan, 1952.

Olmsted, Denison. *Memoir of Eli Whitney, Esq.* New Haven, CT: Durrie & Peck, 1846.

Smith, Page. *The Shaping of America: A People's History of the Young Republic*. New York: McGraw-Hill, 1980.

Woodbury, Robert S. "The Legend of Eli Whitney and Interchangeable Parts." *Technology and Culture* 1, no. 3 (Summer 1960): 235–253.

**Website:** [www.eliwhitney.org](http://www.eliwhitney.org) (The Eli Whitney Museum and Workshop)

# Background Essay

**Place:** New Haven, Connecticut, along the Mill River

**Time:** 1808

## ***The Industrial Revolution***

Before there was an industrial revolution in America there was one in Britain. Before there was an industrial revolution in Britain, there was an agricultural revolution. During the 1700s, farmers, particularly in Britain, were able to make their land more productive using new inventions like the iron plow, mechanical reapers, and thrashers, machines that replaced hand methods of harvesting crops. The biggest changes soon occurred in the textile industry because of a string of mechanical inventions, all coming from the minds and hands of creative British innovators: the flying shuttle, the spinning jenny, the water frame, the spinning mule, and the steam engine, all of which revolutionized the production of textiles. With these inventions came the factory system, and workers left their cottages to work in buildings situated near water for power.

## ***Britain booms***

On the heels of the advances in the textile industry came the development of the iron and coal industries, which then led to advancements in transportation—canal building, new roads surfaced by crushed stone, the railroad and steamship businesses. All these changes led to what we now call the Industrial Revolution. Britain led the Industrial Revolution because it enjoyed several advantages: a surplus of workers, abundant iron and coal resources, a developing transportation system, timely inventions, an encouraging government, a social and intellectual climate. These were all conducive to economic growth and expansion. Not far behind, and destined to surpass Britain in the late nineteenth century, was the young United States just a few decades after winning its war of independence against Britain. As America started

its own industrial revolution, two names out of several emerged who were most instrumental in the budding revolution: Eli Whitney and Samuel Slater.

## ***Giving the British “the slip”***

The factory system in the United States, with its large buildings and warehouses and a usually regimented workforce making one particular product with power-driven machines, can be traced in part to the early work of a twenty-one-year-old English immigrant. Samuel Slater, a bright and highly skilled mechanic, had worked in a cotton textile mill in England. He gained expert knowledge of the new spinning and weaving machines propelling the industrial “revolution” in his country. Secretive about their new technology, the British inventors and industrialists got the government to forbid the sale of the machines and to forbid their textile workers, inventors, and business people from leaving the country. They feared replication of ideas and machines elsewhere. Disguised as a young boy, Samuel Slater slipped through British authorities and soon found himself on a ship to America.

## ***All in his head***

Arriving in New York City in 1789 nearly penniless and with few possessions, Slater’s future was in his head: plans and designs for power-driven machines to spin and weave cloth that he had memorized in England. Soon in Pawtucket, Rhode Island, Slater partnered with Quaker merchant Moses Brown, who supplied the funding. Slater then impressively reproduced from memory the machines, devices, and small tools he had known and used in England. Most of the essential apparatus was reconstructed with the aid of a carpenter and a blacksmith.

As a result, by 1793 Slater was operating a successful cotton-textile factory and mill, using water-powered machinery. Interestingly, all of the workers in his mill were children, ages seven to twelve.

### ***"Father of factories"***

Slater's ideas, work, and influence spread quickly. Similar mills cropped up all over New England and the middle states. Cotton from the South, increased by volume because of Eli Whitney's invention, poured into these mills. Justifiably, Slater earned the title "father of the factory system" for his pioneering efforts. Indeed, he played a vital role, as did Whitney, in the shift from work being done in homes and small shops to mass-produced manufacturing being done in American factories using power-driven machines. By 1812, Slater controlled a dozen companies—mills or factories—in New England. He died in 1835, leaving a unique legacy in an expanding and enterprising America.

### ***Whitney and his gin***

Few inventors have revolutionized the world like New Englander Eli Whitney. A recent Yale graduate, in the early 1790s Whitney was tutoring children on Mrs. Nathanael Greene's Georgia plantation, Mulberry Grove. Seeing a need, he devised a small machine that separated the seeds of the cotton boll from its short-staple fiber. This device soon became fifty times more efficient than separating the bolls by hand. Almost overnight, Whitney's cotton engine changed American cotton manufacturing from a dying industry to a profitable one. Ironically, the slave labor required to work the cotton fields also increased, perpetuating a system nearly on its last legs. Thus, the South's chief commodity became "King Cotton." Its partner, slavery, became more entrenched—all or mostly because of the cleverness of a young Yankee inventor. The South had been given a tremendous economic boost and settled into its "golden age."

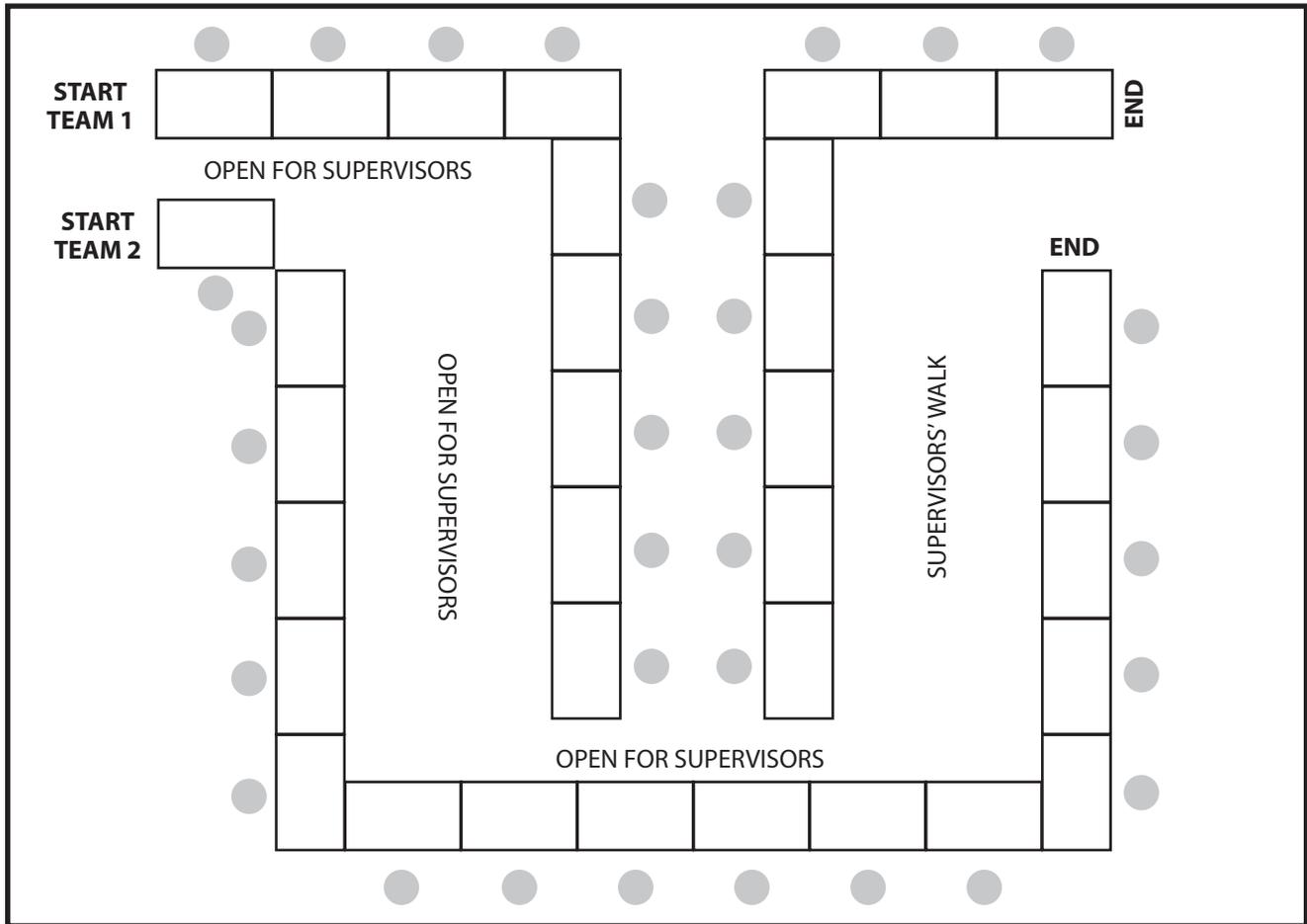
### ***"Wizardly" Whitney***

Eli Whitney's cotton gin affected American and world history as few inventions of its time did—in some ways as the computer did in the late twentieth century. While the American textile industry used Whitney's invention to flourish, other industries were becoming prominent as well. Some needed a boost—like the manufacturing of firearms. Up to the 1790s, firearms had been hand-tooled by individual craftsmen. So different was each weapon that if one musket had a defective part, that same part from another musket might not fit. The "wizardly" Eli Whitney was destined to play a vital role in this industry as well. He turned his efforts to mass-producing muskets with interchangeable parts for the U.S. Army. In 1798, Whitney conceived the idea of mass-producing by machines identical parts for muskets. Working for a few years on machines only, the handy New Englander nearly lost government support until he went to Washington. In front of important but skeptical officials including Vice President Jefferson in January, 1801, he reassembled ten muskets from scrambled parts and fired the weapons. What he impressively demonstrated, of course, was the principle of mass production and assembly-line methods.

### ***Whitney needs mechanics!***

Get ready to start work along Whitney's armory assembly line—under the watchful eye of a supervisor or even the boss, Whitney himself. As "mechanics," you will be given one simple task in the process of producing finished muskets for the U.S. Army, which has contracted with Whitney to turn out ten thousand weapons in a short amount of time. So listen and watch carefully, learn your specific task well, and then work quickly and proudly at your job.

# Schematic



## Suggestions

- It is suggested that the teacher make a prototype musket and put it on a cardboard backing.
- This schematic is for **Option A**—two separate assembly lines. Adjust for **Option B**.
- Speed up/slow down lines to achieve goals.
- Put prototype pages along the lines.
- Run activity for 10–15 minutes, checking for quality control two or three times.

- Adjust worker tasks as needed.
- #17 should “clean up” sloppy work from #1–16 and print the words NEW HAVEN on the bottom half of the lock (firing mechanism).

## Characters needed

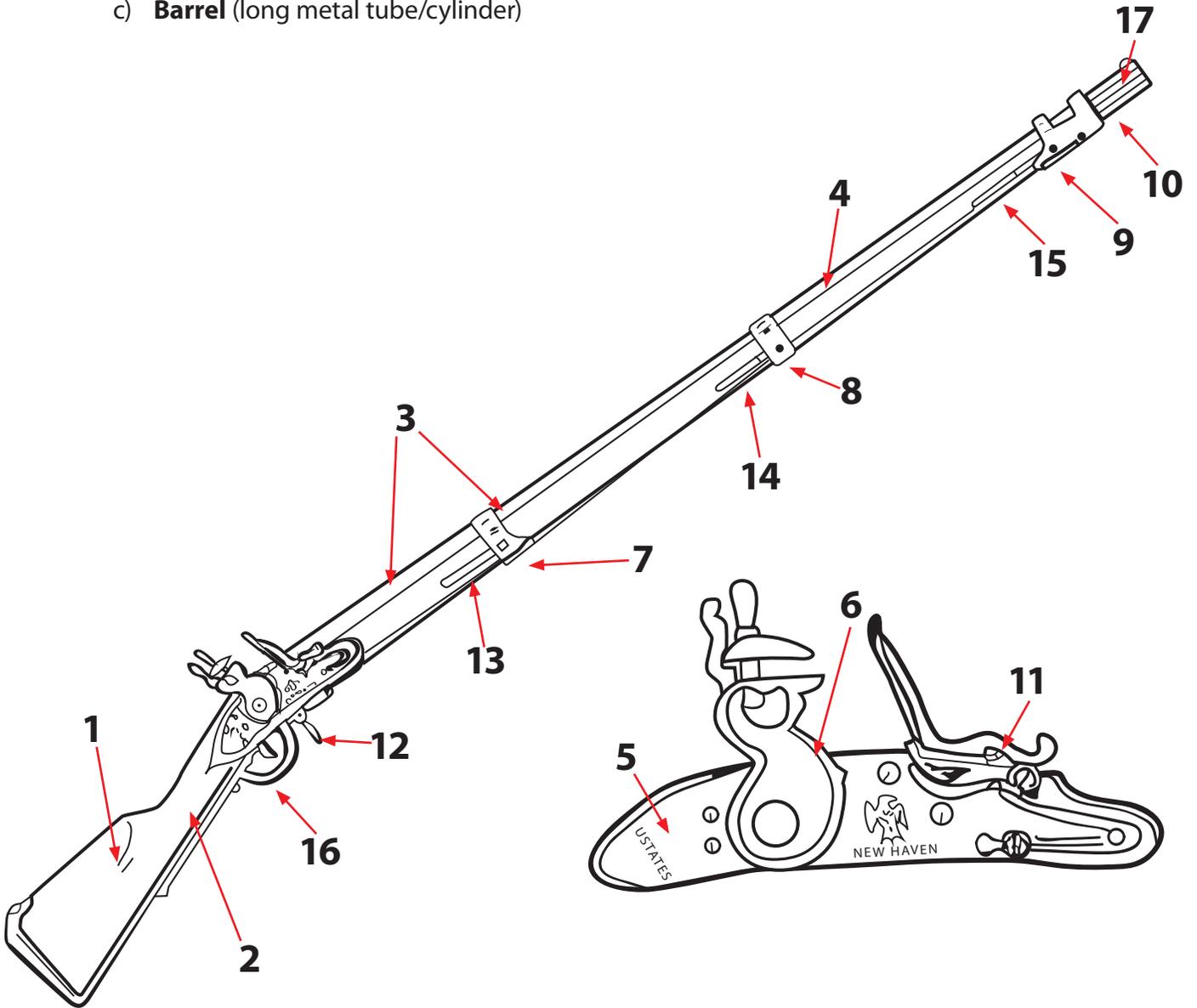
- 2–3 supervisors
- 2 quality control workers (can be supervisors)
- 15–32 workers-armorers
- Eli Whitney

# Prototype Musket

## 17 Steps

### 3 Major Parts:

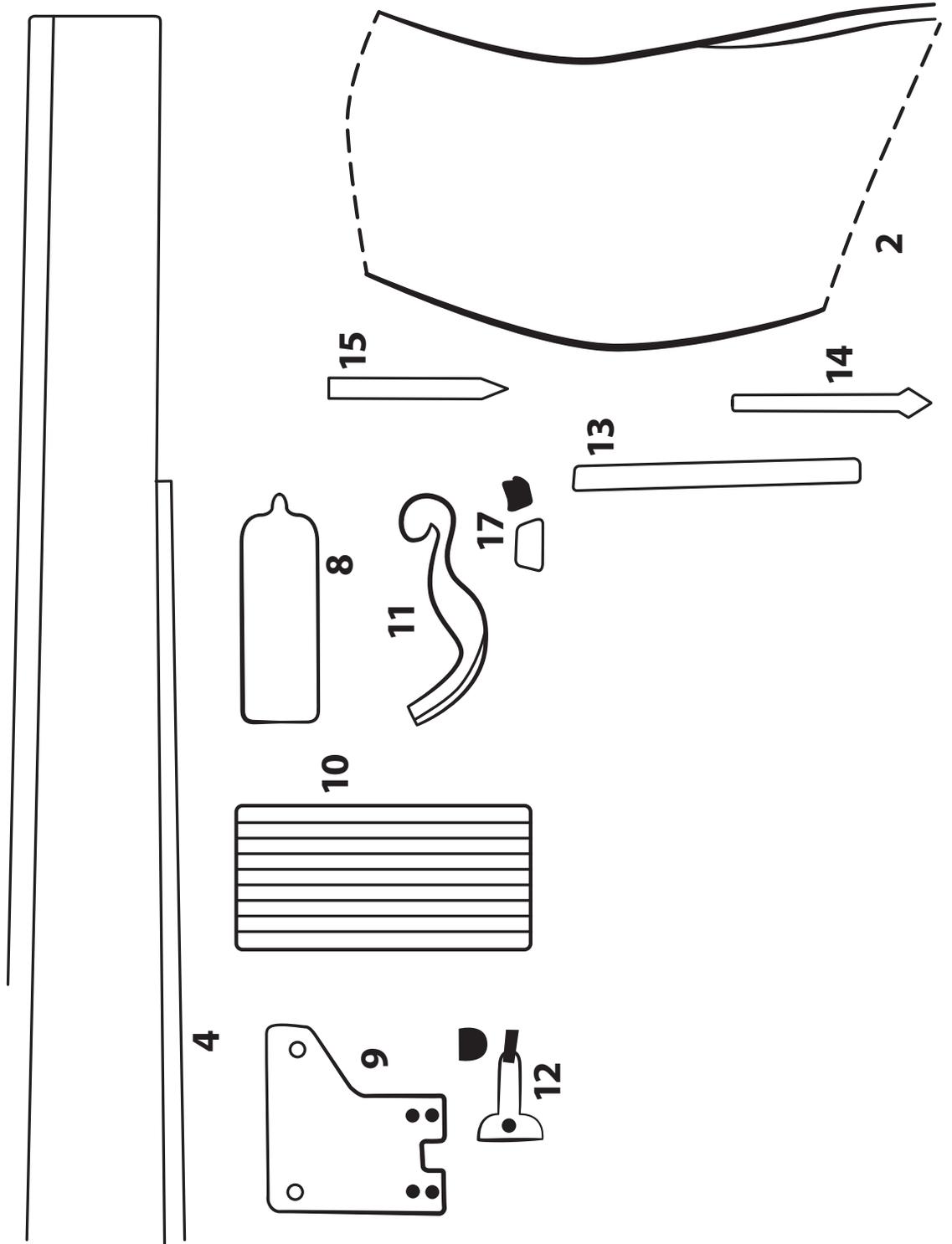
- a) **Lock** (firing mechanism)
- b) **Stock** (wooden piece/handle butted up to shoulder)
- c) **Barrel** (long metal tube/cylinder)



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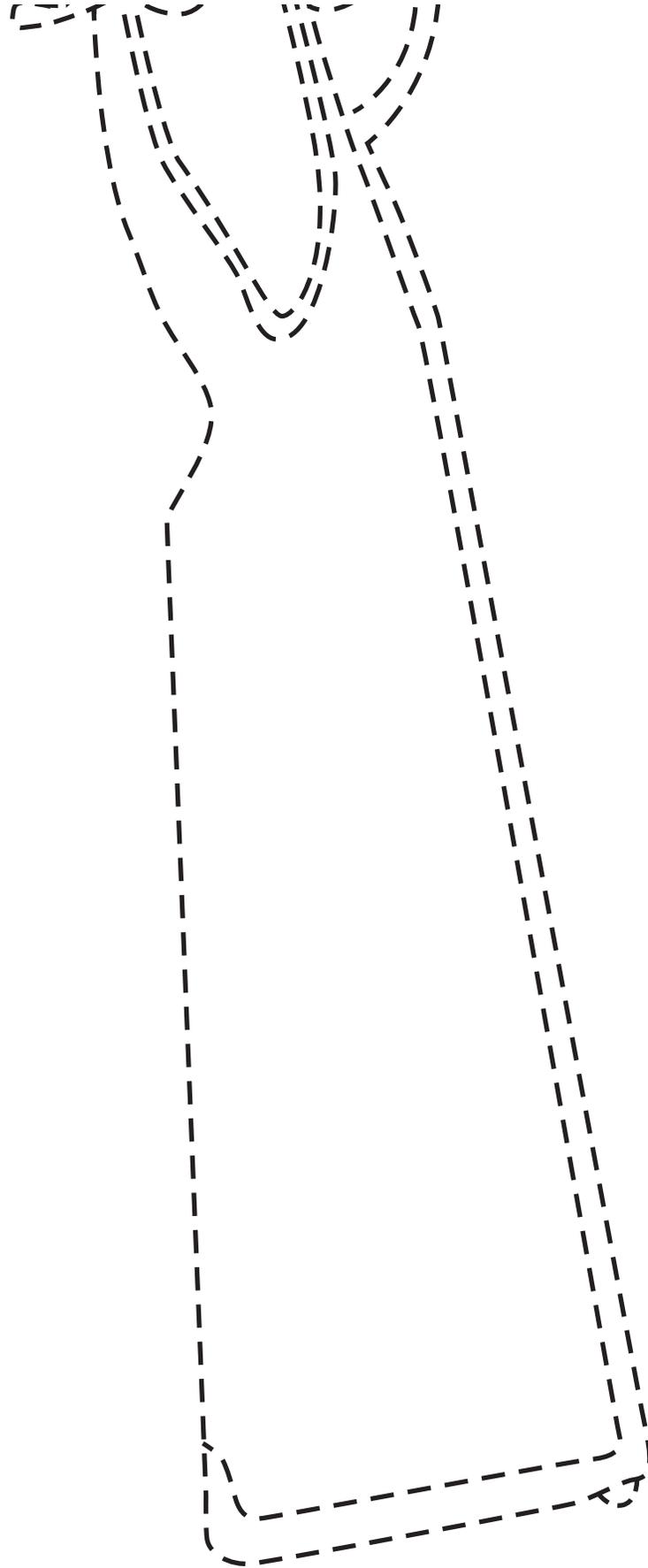
# Musket Parts

THE WHITNEY MUSKET MADE ON THE CHARLEVILLE MODEL (Page 1)



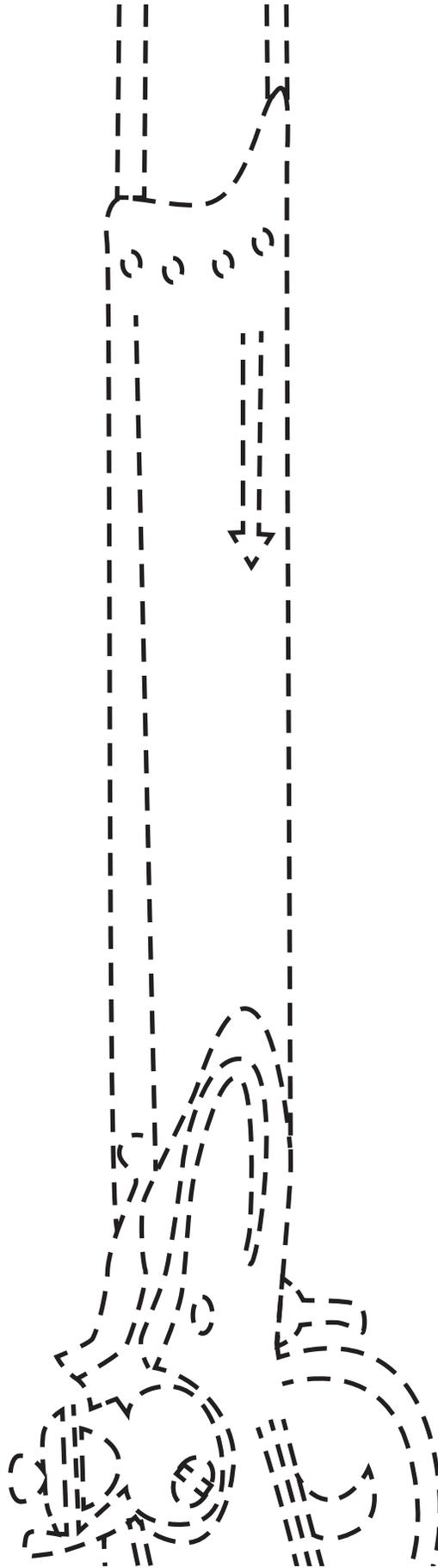


# Musket Outline 1



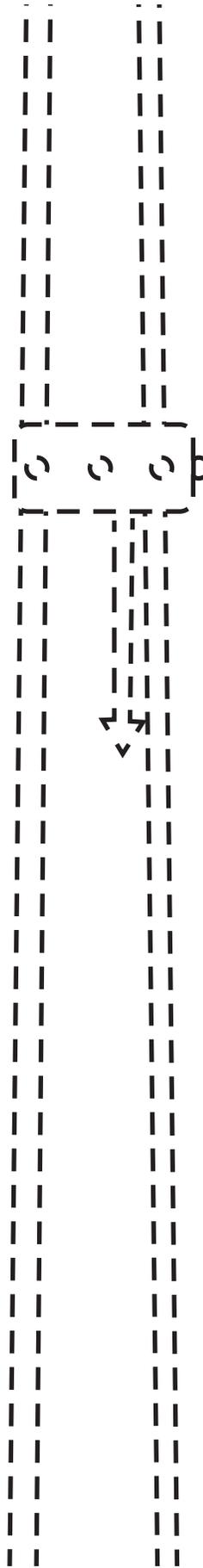
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# Musket Outline 2



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# Musket Outline 3



# Musket Outline 4



# Inside the Armory

After all the words about Eli Whitney have been written, perhaps a summary of his deeds could be: he was a genius with gadgets—a clever gadgeteer—and he had the ability to see that his muskets could be produced in large numbers. He was able to train his workers—men who had no previous gunsmithing experience—to perform a simple, single step using interchangeable parts along a line that called for a division of labor.

We really don't know how this assembly line of workers actually played out. In Whitney's words, it was a series of "jigs and fixtures." His experience with the cotton gin and a patent that was virtually ignored throughout the South by plantation owners caused Whitney to be quite secretive about the details of his production processes. We do know what kinds of machines were used and that the entire process was laborious, often difficult, boring, and complicated—for every worker! One can imagine the different tasks performed to produce a musket in 1808 and under the pressure of a government contract. There would be workmen filing, milling, boring holes, foraging, rolling, grinding, polishing, drilling, cutting, hammering, screwing, lathing, stamping, "nitching," sawing, framing, staining, and painting, to say little about the inspecting and actual firing of the muskets before delivering the weapons to the army. The order and format of this process can only be surmised.

Unfortunately, no machines exist today from Whitney's original armory in Connecticut.

# Postscript

When people mention Eli Whitney today, his name ultimately is connected to his invention of the cotton gin, a machine that increased cotton production and the number of slaves needed in the fields. Few, if any, remember (or were taught) the association he had with interchangeable parts and the mass production of army muskets.

His famous demonstration in early 1801, with Vice President Jefferson looking on, was impressive enough for Whitney to be given a contract with the U.S. government. Overstating what he could actually produce, Whitney's efforts (and his armory workers) would not generate enough muskets to fulfill the original contract. In Whitney's defense, the processes of inventing and building his machines (mostly milling machines) to make the muskets were slow and laborious. As if he had a contract with destiny as well, on January 23, 1809, Whitney informed the secretary of war that the last of the ten thousand contracted muskets were delivered and ready for inspection.



Eli Whitney

The timing was perfect. Within three years, the United States went to war with Britain (the War of 1812). Because of Whitney's skill and persistence, and the government's patience, the soldiers fighting the "Second War of Independence" carried and fired "spiffy" new American-made muskets from Connecticut's Whitney Armory at Mill River. Thanks to the inventor himself, his many armory workers, and the government's financial support, the Whitney Armory's production was a stunning success. In the next four years, his armory produced fifteen thousand more muskets! It has been suggested, however, that Whitney himself made just \$2,450 profit from his contract.

Forever the clever inventor, Whitney next tackled the need to make milling and filing machines that would cut more precise metal for parts than could be cut by hand. This he did, making it possible for the muskets' more intricate pieces to snap into place quickly and thus almost guarantee a fire-ready and accurate weapon. This time Whitney chose not to apply for a patent for his new milling machine, as he had for the cotton gin. Instead he made his invention available to other armories making muskets. Sadly, the inventor of the cotton gin and pioneer of mass manufacturing in America died on January 8, 1825.

While historians acknowledge his contributions with the cotton gin, not all agree that Whitney blazed a trail by originating the concept of interchangeable parts in mass producing army muskets. Others in Europe were also using standardized parts for production. Yet, Whitney appears to have conceived his version independently of the others. Independent invention by widely separated people is uncommon but not unique.

*Image Source:* Courtesy of the Yale University Art Gallery, via Wikimedia Commons.

Whitney can be given credit for being the first to fit his ideas into an industrial system (what would later be called the "American System"). Whitney laid a foundation upon which succeeding generations would build: Samuel Colt's first large order for his six-shooters was manufactured in Whitney's armory, Isaac Singer's sewing machines were mass-produced, and Cyrus McCormick's agricultural implements, which would revolutionize farming on the Great Plains, were mass-produced with standardized parts as well. During the Civil War, thirty-five years after Whitney's death, the Union armies wore shoes manufactured in the same streamlined way. Fifty years later, Henry Ford's modern and efficient assembly-line methods in Detroit owed much to Whitney's armory in the early 1800s.

Eli Whitney's "uniformity system" using a division-of-labor technique to produce the entire musket—"lock, stock, and barrel"—is carried on today in the manufacture of just about everything we purchase, from clothes, food, construction materials, and tools to cars and perhaps even to our interchangeable jobs! Because of it, we could be called an "interchangeable society." Should we credit Eli Whitney for all this? Did his concept of a division of labor with workers using interchangeable parts in factories, lead to mind-numbing work, alienation, and the disappearance of craftsmanship? In short, did Whitney unknowingly shape our society as few before or after him have done?



An 1827 view of the Eli Whitney Gun Factory in Whitneyville, Connecticut's Mill River flowing through the middle ground.

Image Source: Painting by William Giles Munson. Yale University Art Gallery.



# Historical Investigation Activity

## *Eli Whitney's Armory (1808)*

By Bill Lacey

### Focus Question

Eli Whitney: Does he deserve to be considered an American legend for his innovative use of interchangeable parts?

### Materials Needed for This Historical Investigation

- **Documents A–G**—*class set*
- **Points to Ponder Response Sheet**—*class set*

### Lesson Plan

#### 1. Getting Started

- Whether you did the Activator on Eli Whitney or not, review or find out what students know about him and his inventions and what kind of impact his work had on U.S. history. Put responses on the board as spokes of a wheel with the hub labeled “Eli Whitney.” The discussion that follows should serve as a backstory to the **Focus Question** and the documents the students will analyze.
- As a motivator/warm-up, try a show and tell exercise using two or three ballpoint ink pens and caps (use the same brand of pen!) to illustrate interchangeable parts. Other examples might be Lego pieces, same-sized nuts and bolts, etc. See what examples your students come up with.

#### 2. Backstory to Use as Instruction

- Hear the words “cotton gin” and the name of its inventor, Eli Whitney, comes to mind. But when someone says “interchangeable parts,” does his name also come up? Probably not. Whitney is, however, connected and associated with this concept—the idea of mass-producing (in his case, army muskets/firearms) thousands of the same product using parts that can be interchangeable. This is done often by a division of labor along some sort of assembly line, upon which one single task is repeated over and over by one person, before being passed to the next worker.
- The cotton gin, Whitney’s first and most famous invention, stands out as a brilliant solution to the time-consuming problem of separating the cotton from the seeds. His “engine,” or machine, solved the vexing problem on plantations in the South and his innovation had arguably a shattering impact:



- 1) With the lure of more profits from growing cotton, owners planted even more acres, extending the Cotton Kingdom to new regions of the South.
  - 2) This increased the need for more slaves to work the cotton fields, thus invigorating the then-dying institution of slavery.
- Whitney's patent for the gin was ignored by planters in the South. They soon duplicated his machine without paying Whitney. In response, Whitney brought more lawsuits against them, spending his own money to litigate these suits and, as a result, ended up in serious debt. The only bright spot for Whitney by 1796 was that he had achieved fame but, again, very little financial compensation.
  - So, how to get out of debt? Whitney looked around and found that the government sought enterprising men to manufacture firearms for the U.S. Army. At this time, a war with France seemed imminent and moreover, better weapons became almost a necessity. At the same time, in the 1790s, the young nation was beginning to be transformed by another kind of revolution, an industrial revolution, that had begun a few decades before in Britain. New machines were being invented, especially in the textile industry. These machines would make production faster, more efficient, and less expensive in terms of labor since they required mostly unskilled workers. Further, all this labor could be done in a few buildings (called *manufactories* then), not in individual cottages, as before.
  - The spirit of innovation and the motive of profit easily crossed the Atlantic from Britain to America. Samuel Slater, an English immigrant, sailed to America in 1789. With the images and workings of a new textile machine memorized before he left, Slater duplicated the machine and soon started his own business in New England, eventually earning the title "father of the factory system." The work of these two men, Slater and Whitney, signaled the quiet beginnings of America's first industrial revolution.
  - With no experience in manufacturing firearms and with no manufactory or armory or workers (and hardly any cash), Whitney convinced federal officials to contract him to make muskets. Displaying his usual confidence, Whitney overpromised. He agreed to make and deliver ten thousand muskets in two years. He didn't reach his goal until 1809—ten years later. Fortunately, Whitney had allies in the government (one was Thomas Jefferson) and officials in Washington exhibited great patience and generosity, shelling out \$134,000 to Whitney in the original contract.

## Eli Whitney's Armory: 1808

### Historical Investigation Activity



- In his defense, it took years not only to organize and train workers but also to design and make the machines (“jigs and fixtures” he called them) to make the muskets. Once he accomplished these time-consuming tasks, Whitney did produce the muskets and during the War of 1812, American soldiers took pride in their muskets from Whitney’s Connecticut armory.
- The system and processes in which the muskets were produced has been chronicled in textbooks for two centuries. Without a doubt, Whitney did convert his manufactory into a place where muskets were mass-produced. He did use division of labor along a type of assembly line, which turned out weapons that had interchangeable parts. Was he the first though? Should he be given credit for this concept of interchangeable parts?
- There are other names that crop up in the literature, men who could correctly take credit and make Whitney look like an also-ran. They include Simeon North and Captain John Hall, who produced firearms for the army. North signed a contract in 1813 for twenty thousand pistols with parts of the locks interchangeable. Hall used the same techniques at the Harpers Ferry Armory in Virginia (later West Virginia) to produce, in those same years, five thousand rifles with interchangeable parts. Both gunsmiths, North and Hall fulfilled their government contracts on time. Whitney therefore has legions of critics who say that he may not have deserved his legendary hall-of-fame credentials for being the first to implement the idea of interchangeable parts. Still others claim that his muskets were seriously flawed and that many of these interchangeable parts were fashioned by hand, not machines. Whitney’s supporters remain loyal, however. The evidence, they say, is not crystal clear enough to destroy the Whitney legend and mystique. Is it crystal clear?
- Ask students, “From this backstory (and the Activator you have experienced), before we examine the documents on Eli Whitney, do you think the honors and praise for his innovations (particularly his work producing firearms) are deserved? Did his work, if he was first to apply the interchangeable-parts concept, make him worthy of hall-of-fame stature as a great inventor and innovator? Did his work influence others or was it the reverse? Should he share honors with other innovators of his time?”
- Pass out the **Points to Ponder Response Sheet**. Ask students, “From your reading and our discussions, what kind of opinion do you have of Eli Whitney? Should he be a hall of famer?” (Whitney is a member of the Hall of Fame for Great Americans and the National Inventors Hall of Fame.) Allow five minutes for students to write their answers to #1.



- After a few minutes of writing, stop your students and poll them, asking for a show of hands, to give you a working hypothesis. Discuss responses if you have time. Say, "It appears that our working hypothesis, before we look at the documents is that Eli Whitney was . . . and therefore deserves/does not deserve. . . ."
3. Pass out the package of **Documents A–G**. Say, "What do the documents tell us and what can we conclude? That's our task." It may be wise to read the first one or two documents aloud and go over what they say. Remind students to work through the documents carefully, and tell them there is no order or sequence to the documents. Perhaps the first task might be to have students put the documents, in chronological order. Once they are done, release them (in pairs or small groups) to work.
  4. Allow forty to fifty minutes or more for students to work and fill out their **Points to Ponder Response Sheets**.
  5. Discuss thoroughly and have students write their answers to the **Focus Question**. Have volunteers read their answers to conclude the activity.

Name \_\_\_\_\_ Date: \_\_\_\_\_

# Points to Ponder Response Sheet

**Focus Question:** Eli Whitney: Does he deserve to be considered an American legend for his innovative use of Interchangeable parts?

- 1. **My first reaction and my opinion**, before I analyze the documents package, is that Eli Whitney . . .

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- 2. **Document A (three excerpts):** What is the overall opinion of Whitney's achievements of these three books for younger readers? Do they generally agree on key points? In what ways?

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- 3. **Document B:** In his own words, what reason does Whitney give for why he took on the task of manufacturing muskets for the army?

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What excuses does he give for not meeting his contractual deadlines? What does this reveal about him?

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- 4. **Document C:** Jefferson was an ally and supporter of Whitney's work. What kind of evidence for that support is in this letter? At the same time, is Jefferson critical? How so?

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- 5. **Document D:** Does the author make a solid case for Honoré Blanc predating Whitney's work? What evidence does he give?

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What personal credentials does the author have to make such a claim?

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6. **Document E:** What is the perspective of the author of this document toward Whitney? Does the author have academic credibility? In what way?

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7. **Document F:** How do the authors of this document treat the claim that Whitney did not originate the concept of interchangeable parts? What other people and businesses were affected by Whitney's work?

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8. **Document G**

**Excerpt 1:** In what ways did Whitney fail to fulfill his government contract? According to Woodbury, who created the Whitney legend?

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**Excerpt 2:** Who else should be honored as the first to successfully implement the idea of interchangeable parts in the first American Industrial Revolution?

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Why shouldn't Whitney be seen as deserving of this honor?

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# Document A

## Popular Accounts of Eli Whitney's Role in U.S. History (1950–2000)

Very often, the public's point of view of history and history-makers comes from films, "fictionalized" history, and textbooks, be they for juvenile or young adult readers. The textbook in the first excerpt below was published in 1950, and the second in 2000.

### Excerpt 1

*It was Eli Whitney, a Connecticut resident, who hit upon the idea of building machines with interchangeable parts. Without this development, mass production would have been impossible.*

*Whitney's great discovery grew out of his work with guns. Before the early 1800's all guns were manufactured by gunsmiths who hammered out each part separately and assembled the parts by hand. When any part of a gun was damaged, a new part had to be made by hand to replace it.*

Source: Lewis Paul Todd and Merle Curti, *Rise of the American Nation* (New York: Harcourt, Brace & World, 1950). This textbook was adopted for high schools in the 1950s and 1960s.

### Excerpt 2

*Revolutionary changes occurred in other industries beyond cloth making. In 1798 Eli Whitney received a contract from the United States government to make 10,000 rifles in 28 months. To produce this enormous quantity in such a short time, Whitney devised a manufacturing method that would produce interchangeable parts. The idea was to make large quantities of uniform pieces that could replace any other identical pieces.*

*Whitney made a mold for each part of the rifle, and the pieces that came out of the molds were supposed to be identical and interchangeable. The pieces were fairly crude, however, and had to be finished by hand.*

*For Whitney, the new system had its flaws. It took 10 years to complete the government's order. Later, the development of more precise machines that could turn out uniform pieces made interchangeable parts a reality. Interchangeable parts opened the way for producing many different kinds of goods on a mass scale and for reducing the price of the goods.*

Source: Joyce Appleby et al., *The American Journey: Building a Nation* (New York: Glencoe/McGraw-Hill, 2000).

## Excerpt 3

Eli was not the first person to think of the system of interchangeable parts. Years before, some French gun makers were experimenting with a similar system. In the 1790s, Eli probably read reports of their work. But Eli proved that machines could be used to help workers produce the same parts. He taught people that mass production was possible.

Eli's system of interchangeable parts was a success. Other manufacturers copied his ideas. The system helped produce all sorts of goods. Manufacturers used Eli's system to make clocks, sewing machines, agricultural equipment, and tools. U.S. manufacturing became famous. British visitors to the United States thought highly of the uniformity system. They called it the American system.

Eli's success allowed others to follow. He helped make the United States a leading industrial nation. Eli's ideas were the first step to the assembly line. Manufacturers today still use the assembly line to make automobiles, televisions, computers, and other goods.

Source: Katie Bagley, *Let Freedom Ring: Eli Whitney, American Inventor* (Mankato, MN: Bridgestone, 2003). This book is a popular juvenile biography.

# Document B

## Eli Whitney's Own Words

### Excerpt 1

*One of my primary objectives is to form the tools so the tools themselves shall fashion the work and give to every part its just proportion—which, once accomplished, will give expedition,\* uniformity, and exactness to the whole.*

\*expedition—speed in performance

### Excerpt 2

*Bankruptcy & ruin were constantly staring me in the face & disappointment trip'd me up every step I attempted to take. . . . Loaded with a Debt of 3 or 4000 Dollars, without resources and without any business that would ever furnish me a support, I knew not which way to turn. An opportunity offered to contract for Manufacturing Muskets for the U. States. I embraced it. . . . By this contract I obtained some thousands of Dollars in advance which has saved me from ruin.*

### Excerpt 3

*I shall be able to finish some muskets by the time stipulated in my contract for the first delivery but what number I shall be able to Deliver at that time, I do not undertake to say—not so great a number by any means, however, as I expected—though I shall have some of the smaller limbs of the whole ten thousand made by that time—I must also candidly acknowledge that more time must necessarily be taken up in the first establishment of the business than I at first had any conception of—I find it vain to think of employing a great number of hands in erecting the works and making the tools—unless I could actually be present in many places at the same time—I must not only tell the workmen but must show them how every part is to be Done—They are as good as any workmen but I cannot make them understand how I would have a thing done till it is Done.*

Source: Constance McLaughlin Green, *Eli Whitney and the Birth of American Technology* (New York: Harper Collins, 1956).

# Document C

## Jefferson Comments on Eli Whitney's Work

Some believe Thomas Jefferson played an important role in Eli Whitney's success by supporting him early in his efforts to get a government contract to produce ten thousand muskets. It has been suggested that Jefferson even passed on to Whitney what he had seen in France in Honoré Blanc's workshop, specifically the Frenchman's application of interchangeable parts in weapons.

*[Eli Whitney] is at the head of a considerable gun manufactory in Connecticut, and furnishes the US. with muskets, undoubtedly the best they receive. He has invented moulds & machines for making all the pieces of his locks so exactly equal, that take 100 locks to pieces & mingle their parts, and the hundred locks may be put together as well by taking the first pieces which come to hand. This is of importance in repairing, because out of 10 locks e.g. disabled for the want of different pieces, 9 good locks may be put together without employing a smith. Leblanc in France had invented a similar process in 1788 & had extended it to the barrel, mounting & stock. . . . Mr. Whitney has not yet extended his improvement beyond the lock.*

Source: "From Thomas Jefferson to James Monroe, 14 November 1801," *Founders Online*, National Archives.

# Document D

## Does a Frenchman Deserve Whitney's Honor?

Some, like Professor John H. Lienhard, believe that French gunsmith Honoré Blanc predates Eli Whitney in applying interchangeable parts to the manufacture of muskets. Lienhard received his Ph.D. in mechanical engineering from the University of California, Berkeley.

*Americans like to credit Eli Whitney with inventing the idea in 1803 to make muskets.*

*. . . [In 1790] Gunsmith Honoré Blanc had made a thousand muskets and put all their parts in separate bins. He called together a group of academics, politicians, and military men. Then he assembled muskets from parts drawn at random from the bins. By then, Jefferson had already visited Blanc's workshop and written back to America about the method.*

*Jefferson was president when Eli Whitney duplicated Blanc's demonstration 18 years later. No one realized it then, but Whitney was faking it. He'd carefully hand-crafted each part so they'd fit together. Whitney sold the government a huge contract for four thousand muskets. He took eight years to deliver them and then the parts weren't interchangeable after all. . . .*

*. . . Blanc wasn't first to make muskets this way. Various French makers had worked on the idea since 1720. Furthermore, Blanc went into business and, by the time Whitney made his demonstration, Blanc was producing 10,000 muskets a year for Napoleon. . . .*

*Meanwhile, America built upon Whitney's scam.*

Source: John H. Lienhard, "No. 1252: Interchangeable Parts," *Engines of Our Ingenuity*, transcript and audio available at [www.uh.edu/engines/epi1252.htm](http://www.uh.edu/engines/epi1252.htm).

For further support for Honoré Blanc as the originator of modern manufacturing of firearms using interchangeable parts, see Ken Alder, "Invention and America," *Technology and Culture* 38, no. 2 (April 1997), 273–311.

# Document E

## Whitney Dazzles Washington Icons

Dennis Karwatka, whose work is excerpted below, was a professor of industrial and engineering technology at Morehouse University in Kentucky before his retirement.

*The first delivery of 500 muskets to the U.S. government came in 1801. To assure government officials that production was going well, Whitney conducted a well-publicized demonstration at the Capitol in January 1801. His audience included President John Adams, President-elect Thomas Jefferson, members of Congress, and other officials. In an attempt to show that he was making firearms with interchangeable parts, he fastened 10 different flintlock mechanisms to the same musket using only a screwdriver. The officials present were impressed and had no reason to believe the muskets had been specially prepared.*

*Whitney, however, had not disassembled the locks, mixed the parts, and then reassembled them. Jefferson said of the demonstration: "Mr. Whitney has invented molds and machines for making all the pieces of his locks so exactly equal, that take 100 locks to pieces and mingle their parts and the 100 locks may be put together as well by taking the first pieces which come to hand." In reality, no such demonstration had taken place.*

*The belief that Whitney had made interchangeable parts continued into [the twentieth] century. Then, in the 1960s, researchers noticed differences between written records and existing muskets. The physical evidence was unmistakable. Individual components had special identifying marks, something unnecessary for truly interchangeable parts. Also, Whitney muskets in collections such as those at the Smithsonian Institution do not have parts that interchange. It appears that Whitney purposely duped the government authorities.*

*In spite of that shortcoming, Whitney was still a technical pioneer.*

Source: Dennis Karwatka, *Technology's Past: America's Industrial Revolution and the People Who Delivered the Goods* (Ann Arbor, MI: Prakken, 1996).

# Document F

## Eli Whitney's Impact

Both Jeanette Mirsky and Allan Nevins were prolific authors of historical works. Mirsky, a graduate of Barnard College, and Nevins, educated at the University of Illinois, taught together at Columbia University in New York City. Nevins was a distinguished historian, winning the coveted Pulitzer Prize for one of his popular biographies.

*The concept of standardizing parts so that they would be interchangeable did not originate with Whitney alone. Yet, independently, he conceived the idea, as did also Leblanc and Bentham and Brunel. Here the question of priority is misleading—independent invention by three widely separated men is not unique. What can be asserted is that in America Whitney was the first to make the concept into an industrial system.*

*He laid a primitive but broad foundation; on it, part by part, was built the industrial edifice which has made the United States. After Whitney comes a procession of men who developed his initial masterly achievement. Samuel Colt's first sizable order for revolvers was produced in the Whitney Shops . . . where special machinery was devised to make the intricate parts of the six-shooter. Isaac M. Singer's mass-produced sewing machines were young industrial America's first calling cards left in homes throughout the world. . . . Cyrus H. McCormick and his rivals mass-produced agricultural implements that revolutionized northern farming. The new shoe machinery of Lyman Blake manufactured footgear in quantity and in time to equip the armies of Grant and Sherman. Each utilized the skills of his predecessors, each added important new ideas. The procession is long, varied, impressive; it leads directly to Henry Ford, modern precision methods, and efficiency engineering of which Whitney could not even have dreamed.*

Source: Jeanette Mirsky and Allan Nevins, *The World of Eli Whitney* (New York: Macmillan, 1952).

# Document G

## A Modern Scholar Attacks the Whitney Legend

Robert S. Woodbury, formerly a historian of technology at the Massachusetts Institute of Technology, was part of the 1960s revisionism of the Eli Whitney legend. Dr. Woodbury challenged the inventor's "legendary" achievements in the birth of America's first Industrial Revolution. The article he wrote for *Technology and Culture* (1960), a periodical for scholars in this field, appears below in excerpts.

### Excerpt 1: Whitney's Government Contract

*Poking back into the beginnings of this legend, one finds evidence to show that it was at least partially created consciously by its hero and uncritically accepted by most of his contemporaries.*

*Whitney's contract of June 14, 1798 to manufacture arms for the Federal Government is the focus of a number of elements of our legend. . . .*

*. . . Whitney had contracted to deliver 4000 stands of arms by September 30, 1799, and 6000 more by September 30, 1800. Four thousand stands of arms in 15 months, from a factory yet to be built, and made by laborers as yet untrained, and by methods as yet unknown! And 6000 more in the following year! In his desperation Whitney had thrown all caution to the winds. He was no experienced manufacturer, as his deliveries of the relatively simple cotton gin indicate. He was aware that he knew nothing of arms making. . . . Whitney had only the vaguest idea of how he would actually fulfill the contract. . . .*

*In short, from 1801 to 1806 Whitney not only failed to fulfill the contract, he regularly substituted long letters of excuse for honest effort to carry out his obligation, while he chased the richer prize of the rewards he expected from the cotton gin.*

### Excerpt 2: Who was First?

*But where did Whitney get his ideas for manufacture of arms on this new principle? He always claimed that it was his and his alone, and so the legend says, despite strong evidence to the contrary. There can be no doubt that prior to Whitney other men had actually used the principle of manufacture by interchangeable parts.*

*The work of [Honoré] Blanc was clearly known to Thomas Jefferson; in fact our legend always includes a recital of his letter to John Jay in 1785 describing Blanc's work, and Jefferson's letter to Monroe of November 14, 1801, in which he points out that by 1801 Whitney had not developed the method as far as Blanc had in 1788. But the most amazing thing about the Whitney legend is the failure of scholars to follow up this clear lead to answer two questions of first importance: (1) Who was Blanc and what did he do? (2) Did Blanc's work have any influence upon Whitney?*

. . . Even a cursory examination of these sources would indicate that Whitney was far from being the first to introduce the principle of interchangeable parts in the manufacture of small arms. It is also quite clear that Blanc had carried the technique much further than we have any evidence for Whitney's doing.

### Excerpt 3: The Legend of Eli Whitney

Certainly many other men contributed as much or more than Whitney, and evidence for their work can be found, far more convincing than Whitney's boasting claims. The legend says, for example, that the influence of Whitney was the basis of the Colt Armory methods of manufacture. In fact, it was E. K. Root who was the technical genius behind the manufacture of the Colt revolver, and his work stems directly from that of John Hall at Harper's Ferry. Whitney's influence on the manufacture of clocks, watches, and sewing machines is equally open to question.

We know so little of Whitney's actual methods of manufacture that his contribution to interchangeable parts is difficult to assess. What little we do know indicates, if anything, that Whitney was on the wrong track anyhow. John Hall's methods can be fairly clearly established, at least sufficiently for us to be sure that modern interchangeable manufacture derives far more from his inventive genius at Harper's Ferry than from Eli Whitney's manufactory at Mill Rock. Actually one is led to find the origins of the "American system of manufacturing" in the culmination of a number of economic, social, and technical forces brought to bear on manufacture by several men of genius, of whom Whitney can only be said to have been *perhaps* one.

This analysis of the Legend of Eli Whitney and Interchangeable Parts raises more questions than it answers. We have by no means arrived at the truth about the legend, much less about the advent of manufacture by interchangeable parts.

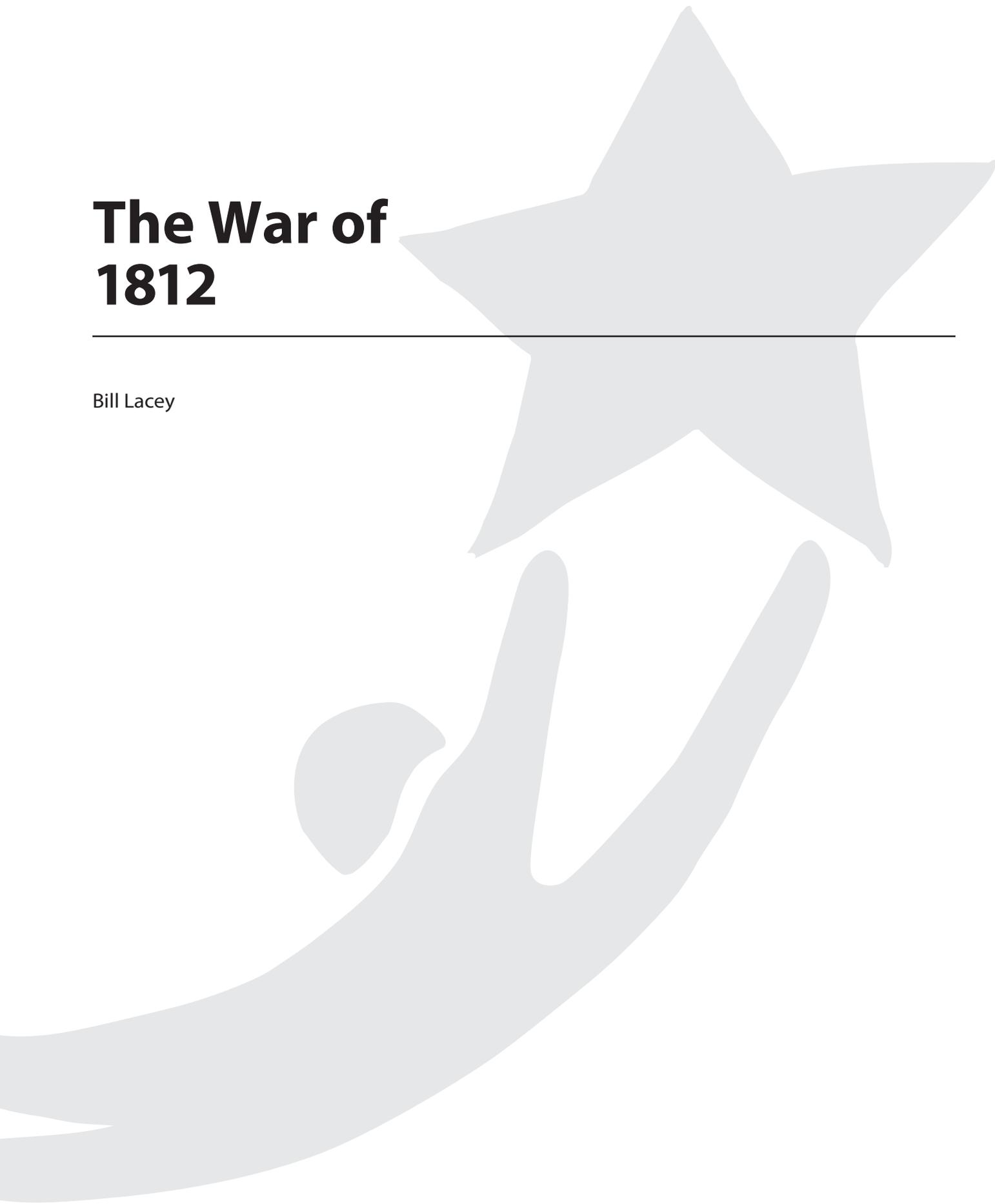
Source: Robert S. Woodbury, "The Legend of Eli Whitney and Interchangeable Parts." *Technology and Culture* 1, no. 3 (Summer 1960) 235–251. Accessed on April 25, 2017, at <https://pdfs.semanticscholar.org/f7f6/828f0be150574062d87c24df791b7c0905b8.pdf>.



# The War of 1812

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Bill Lacey



## Lesson Plan

### Overview

The War of 1812—its causes, course, characters, and consequences—remains one of America’s most misunderstood and least remembered conflicts. Some would say the topic is boring and never easy to teach. Now imagine applying a most unorthodox teaching strategy—hip-hop verses sung by your students—to cover the entire war from impressment of U.S. sailors to the peace treaty with Britain. All the major characters perform: Napoleon, Henry Clay, Dolley Madison, pirate Jean Laffite, even the White House and the Treaty of Ghent rap their parts. Taking a cue from 2015 Broadway sensation *Hamilton*, versifying this war allows students to learn and understand in a contemporary format that will resonate with even bored and jaded students.

### Setup

#### 1. Duplication

- **Background Essay**—*class set*
- **Postscript**—*class set*
- **Narration/Script**—*2–3 copies* for narrators. If you decide to use a stage manager, duplicate an additional copy for that student.
- **Guest Profile Sheets**—*one copy* for each guest: total 14
- **Summary Statements**—*class set* or *one copy* for each of the 15 summary staterers
- **Versifying the War of 1812**—*class set*
- **Sidebar 1812: Uncle Sam—America’s Symbol** (optional)—*one master copy* to read aloud

#### 2. Schematic, props, costumes

- a. Study the **Schematic** carefully.
- b. Note that the general setup of your classroom desks is traditional, yet allows for plenty of room for two raised platforms and chairs in front for all fourteen guests and later for all fifteen summary staterers.
- c. If you choose to encourage students to “dress up,” let these particular students know several days prior to the activity, so they can accumulate the costume pieces. Imagine the roles of Napoleon, Dolley Madison, and the pirate Jean Laffite in costume, or how a clever student might dress up as the White House or the Treaty of Ghent!

- d. The only essential prop is a slightly raised platform for guests to use when they perform their songs. Otherwise, consider a large banner: "The War of 1812—in Rap!" or "A Rappin' War of 1812."

### 3. Roles

- a. At least a day before the actual activity, select students for each role.
  - 14 guests (from Napoleon through historians Budd and Beecher)
  - 15 students to read the summary statements at the end of the activity (ideally, these students should not be the same ones who played guests)
- b. Assign the roles of narrators and guests to your most responsible and dramatic students.

4. **Narrators:** There are at least two narrators who read key parts of the script, usually the introduction and the narration in between the guests' rap songs. Thus, the narrator's role is to connect the characters' rap songs and give the activity its continuity. The students you select to be narrators should share the reading load equally.

### 5. Further suggestions

- a. Allow some time in class for the narrators to divvy up the reading responsibilities. Also encourage narrators and guests to prepare at home, practicing their background and rap lyrics. Memorizing the lyrics is not a bad idea. Try to find a recording of a rap beat for the activity.
- b. Encourage guests to write their own rap lyrics, but caution them to write appropriate, discreet lyrics that fit their age and the historical facts.
- c. There are separate roles for about thirty-one students. Adjust the number of roles to fit your class size.
- d. Set a high standard for your students. As an example before the activity, you should pick a guest and rap the lyrics with drama, humor, and assertiveness.
- e. Stage the activity as if it might be televised. Make sure students are having fun and learning.
- f. The **Summary Statements** should be implemented immediately following the narration to "seal in" the knowledge displayed.
- g. As a flourish, and to set an example, write a rap on a topic like teaching, schools, teenagers, etc., and then perform it.

## Directions

1. Either hand out the **Background Essay** as homework the day before class or pass it out now. If you have given it as homework, conduct an informal discussion of the main points. If you are going over it now, you can read it aloud to students or put students in groups of four or five and have them read to each other. Alternatively, you can use the essay to create a brief lecture and present the data to the class.

You have at least two different ways you can conduct this Activator:

### Option A

1. The Activator plays out in full, from the **Background Essay** through the **Postscript**, including the reading of the entire script, the rapping by all fourteen guests, and the declarations by all fifteen summary stater.
2. Duplicate and distribute all handouts to guests, narrators, and summary stater.
3. Rearrange the room to resemble the **Schematic**.
4. Arrange to film the entire activity.
5. Check for understanding: Do your students know the background data and how the activity will play out?
6. Make sure all students in key roles are ready. All guest rappers should be ready to perform the handout's lyrics or lyrics that they have written themselves.
7. Let the activity begin with the narrator's dramatically reading the script.
  - a. The first important segment has the guests introduce themselves, reading from their **Guest Profile Sheets** ("When I'm introduced").
  - b. Encourage brief applause for each throughout the activity.
  - c. Script narration continues until all have rapped their song lyrics.
8. As a follow-up, hand out the fifteen **Summary Statements** slips to students who were not in the activity yet. Have them form a circle or semicircle around the rest of the class, or line them up in numerical order (#1–15). Have these students read their statements dramatically. You may choose at this point to amplify or clarify the statements for understanding.

## Option B

1. The Activator plays out with a more abbreviated use of materials.
2. The **Background Essay** and **Postscript** can be summarized in a brief lecture.
3. Some of the guests can be eliminated and thus some of the narration can be excised as well.
4. Read through the **Narration/Script** but implement a less formal activity.
  - Have students playing the key guests remain seated when they read. Perhaps seat these fourteen readers and two narrators in a circle, or in chairs lined up in front of the class. This setup still allows the guests to introduce themselves and rap their songs.
5. To check for understanding and perhaps “seal in” the information presented, consider using the **Summary Statements**. This serves as a closure and you can have fifteen different students (ones who were not in the rap activity) participate, reading in a circle or lined up in front of the class.

## Debriefing

Decide whether you wish to use a short or long debriefing. Here are possible ways to make meaningful what happened during this war and the Activator.

### Short Debriefing

1. Pass out the **Postscript**. Either read this to your students or summarize the main points of each paragraph in a brief lecture before moving on. The emphasis in the **Postscript** is on myths of the war that Americans continue to hang onto.
2. Ask students to discuss what they learned and what the fourteen “guests” felt as they played their roles.
3. Consider having students write a Learning Log entry following this short debriefing.

### Long Debriefing

Use one or more of the following debriefing activities:

1. Pass out the **Postscript**. Either read this to your students or summarize the main points of each paragraph in a brief lecture before moving on. The emphasis in the **Postscript** is on myths of the war that Americans continue to believe.

2. **Discuss:** Are you convinced that, despite what the critics call the war—silly, inconsequential, futile, unnecessary, a sideshow fought against Britain’s “B” team—the War of 1812 is worthy of serious study?
3. **Discuss:** According to a *USA Today* article (June 15–17, 2012, weekend edition), America’s “whatever” war was an important crucible of national identity for Canadians, who fought with the British against American invasion forces. The War of 1812 is significant to Canadians, and its bicentennial in 2012 was earnestly celebrated. What would Canada be like today if the United States had successfully invaded, occupied, and annexed Canada and made states out of the provinces?
4. **Discuss:** What reasons can you give to explain the over two hundred years of “good neighbor” relations between Canada and the United States since this war?
5. Distribute the handout **Uncle Sam: America’s Symbol**. It tells the story of how, over the last two hundred years, Uncle Sam became the personification of the United States.
6. To further demonstrate what students learned about the causes, course, and consequences of the War of 1812, select a few, or several, of these:
  - a. Create a 4" x 11" bumper sticker for or against the United States’ participation in the War of 1812.
  - b. Create two 4" x 11" bumper stickers:
    - For a wagon in New England opposing the war
    - For a wagon of a War Hawk in the West
  - c. Create a seven-digit license plate for two of these people (if they drove cars in 1815). Make reference to their role in 1812.
    - President James Madison (or wife, Dolley)
    - Daniel Webster
    - General Andrew Jackson
    - Francis Scott Key
    - Captain James Lawrence
    - Admiral George Cockburn
    - A War Hawk
    - Jean Laffite
    - The White House
    - The city of New Orleans

- d. Create a certificate of honor and achievement for one of the war's American heroes (e.g., Jackson, Lawrence, Stephen Decatur, Commodore Thomas Macdonough, Dolley Madison). Make it framing-sized for display.
- e. Write a snappy dialogue between President Madison and a critic of the war (possibly Daniel Webster, a representative of New England's seafaring-merchant class and economic interests).
- f. Write an obituary for Captain James Lawrence and "engrave" his tombstone with a fitting epitaph.
- g. Compose and then stage a dialogue between British general Edward Pakenham and American general Andrew Jackson as they meet in a neutral site just before the Battle of New Orleans.
- h. Assume the telephone or the telegraph existed in late 1814, and negotiators at Ghent, Belgium, had access to them.
  - Write a telephone conversation between a U.S. negotiator and President Madison.
  - Compose a Western Union telegram sent and received by the same pair.
- i. Write a "War Hawk" speech urging President Madison to ask Congress to declare war on Britain.
- j. Write a dialogue between British and American sea captains regarding the impressment of American sailors.
- k. Explain the words Francis Scott Key wrote in "The Star-Spangled Banner"; then illustrate the event that inspired his words.
- l. Write a five-line limerick about one of these:
  - The torching of the White House
  - Macdonough's victory at Plattsburgh
  - Jackson's victory at New Orleans
  - Dolley Madison's rescue of Gilbert Stuart's portrait of George Washington
  - The latest peace news from Ghent, Belgium

Remember: A Limerick is an often silly, humorous, or nonsensical verse of five lines, usually with a rhyme scheme of AA, BB, A. The third and fourth lines are usually shorter.

Example:

In the war we have studied just now  
Both sides did continually vow  
To try as they might  
To win every fight  
But the war was a tie, anyhow

- m. Research ships from this era and then illustrate a few of them to demonstrate that you know the differences between a frigate, brig, schooner, sloop, and man o'war.
- n. **Vocabulary Building:** Using the word "impressment" (or "War Hawk" or "Tippecanoe," etc.) make as many words as you can from only the letters in the word, in any combination. Circle the words that relate to "impressment." Example: PRESS, MINT PEN, MESS, SENT, PENT, IN REST, TERSE, IMPRESS, etc.
- o. Do a word train, starting with "War Hawk," that has some relation/relevance to the War of 1812. Note: The last letter of the word dictates the first letter of the next word.

Example:

WAR HAWK  
KENTUCKY  
YANKEES  
SLOOPS  
SARATOGA  
ARMSTRONG  
GREAT BRITAIN  
NEW ENGLAND  
DECATUR  
ROYAL NAVY  
YORK  
KEY

- p. Compose a 1-2-3 poem, using words or syllables.

Example:

(1) A  
(2) stalemate  
(3) the war was  
(1) But  
(2) it gave  
(3) the United States  
(1) another  
(2) new  
(3) birth of freedom  
(1) from  
(2) Great Britain  
(3) reviving pride and  
(1) spreading  
(2) national patriotism  
(3) all over America

## Resources to consult

Borneman, Walter R. *1812: The War That Forged a Nation*. New York: Harper Perennial, 2004.

Caffrey, Kate. *The Twilight's Last Gleaming: Britain vs. America, 1812–1815*. New York: Stein and Day, 1977.

Hickey, Donald R. *Don't Give Up the Ship! Myths of the War of 1812*. Urbana: University of Illinois Press, 2006.

———. *The War of 1812: A Forgotten Conflict*. Urbana: University of Illinois Press, 1989.

Lord, Walter. *The Dawn's Early Light*. New York: W. W. Norton, 1972.

Remini, Robert V. *The Battle of New Orleans: Andrew Jackson and America's First Military Victory*. New York: Penguin, 1999.

## Visual history

**Feature film:** *The Buccaneer* (1958) is the story of the Battle of New Orleans directed by Cecil B. DeMille's son-in-law (at the time), Anthony Quinn. Charlton Heston plays General Jackson and Yul Brynner plays Jean Laffite. You might want to save this film to use a snippet as a motivator for the **Historical Investigation Activity**.

**Documentaries:** *War of 1812* was shown on PBS in 2011. It is available through Social Studies School Service ([www.socialstudies.com](http://www.socialstudies.com)). History Channel also produced a documentary in 2005, *The War of 1812* (280 minutes).

Visuals are important and often essential. And while there are countless visuals to use in the classroom for this particular Activator (films and documentaries), most of these might be difficult to find and then show. Instead, it is recommended that you might find it easier to go online to locate exactly the kind of visuals most appropriate. As of 2017, the YouTube series Crash Course with John Green has been extensively utilized by teachers.

# Background Essay

**Place:** War zones in and around southern Canada, the eastern United States, the Great Lakes, and Louisiana

**Time:** 1812–1815

This activity will involve you in the exciting events surrounding the causes, course, and consequences of one of America's nearly forgotten wars—the War of 1812. You and your classmates will play real and fictional historical characters by singing rap/hip-hop songs. Before you participate, let's get some perspectives on this war.

## ***The “sandwich” war***

It's true that the War of 1812 doesn't get much respect. One reason is that the war is positioned (“sandwiched”) between the American Revolution and the Civil War, the two most pivotal conflicts in our history. Twentieth century wars—World Wars I and II and the Korean, Vietnam, Gulf, Afghanistan, and Iraq wars—seem familiar, and a few of them occurred very recently. There seems to be a lack of interest in the War of 1812. In 2012, various state governments involved in the war held 200th anniversary celebrations. Most observers, however, would say there was no celebration; any noteworthy acknowledgment of the conflict passed quietly. At the time of the War of 1812, there was no shocking Pearl Harbor-like incident to arouse national passion, unite the country, and justify the war. In fact, the War of 1812 was an unpopular conflict, fought by a divided nation, much like the Mexican War (1846–1848) and the Vietnam War (1964–1973) after it.

## ***A war nobody wanted***

So maybe it's obvious why the War of 1812 hasn't resonated or received a lot of attention over the past two centuries since the ink was wet on the Treaty of Ghent in 1815. Even President Harry S. Truman called the war “the silliest damn war we ever had.” Other critics

have labeled it unnecessary, foolish, pointless, impractical, strange, mismanaged, even futile and inconsequential. *USA Today*, in a June 2012 issue, called it the “whatever” war and “a sidebar.” It was, in short, “a war nobody wanted”—Americans, Canadians, and British alike. One historian wrote that the unprepared United States going to war was like a Kansas farm boy swaggering into his first saloon. The American armies, especially, were amateurs and were ill-prepared to fight any kind of war, especially the “raw impact of an all-out war.”

## ***A tie—“kissing your sister”***

For many students, studying the war has been a mind-numbing trivial exercise in recounting countless ground and sea battles between “creaking sailing ships” and inexperienced armies led by often bumbling, bungling generals. Yet, it was, like all wars, intensely violent, with cannons and rockets devastating towns; government buildings were burned and thousands of men, women, and children were killed, wounded, or maimed. All this in just two and a half years and against Britain's “B” team, since defeating Napoleon in Europe was their priority. One modern historian of the war, Donald Hickey, estimated that about 2300 U.S. soldiers were killed and nearly 5000 were wounded. These statistics don't factor in how many died of disease. We have no accurate records of this, but in most nineteenth century wars, twice the number usually succumbed to disease. On top of this, the war cost about \$158 million, excluding property losses or damaged and lost economic opportunities. The most startling fact of this war: It ended in a tie—there was no conclusive winner. A famous college football coach, facing reporters after his team tied another team, said

that a tie was like “kissing your sister”—not daring or exciting at all. It’s all about winning.

### **A closer look**

A closer look reveals that the war was not equal to the Revolutionary War, the Civil War, or World War II in impact but it left positive outcomes and can be called, in a certain way, a “second war for independence.” Moreover, some support the idea that the war helped shape the political geography of North America. The war produced some genuine “heroes,” four of whom were eventually catapulted to the nation’s highest office: Andrew Jackson, John Quincy Adams, James Monroe, and William Henry Harrison. Interestingly, most of the war’s important battles took place at sea or on lakes. It’s no surprise that the events most remembered—the bombardment of Fort McHenry described in Francis Scott Key’s immortal poem, Jackson’s “happy ending” victory at New Orleans, and even the torching of Washington, D.C., by an invading British army—all took place near water.

### **Stirring words**

From stirring events came stirring words that reverberate today and enlighten us as we try to

recall the war’s highlights. Words like “We have met the enemy and they are ours” or “Don’t give up the ship!” can bring the war closer and remind us of heroic episodes. Perhaps our best connection to the War of 1812 comes to us when we’re at a modern sporting event and sing “The Star-Spangled Banner,” the words of which were jotted down by a Washington lawyer as he watched from a British ship the bombardment of an American fort near Baltimore. Whatever our connections to and attitudes about this war, the topic itself seems worthy of study.

### **Get ready to rap or rhyme the war**

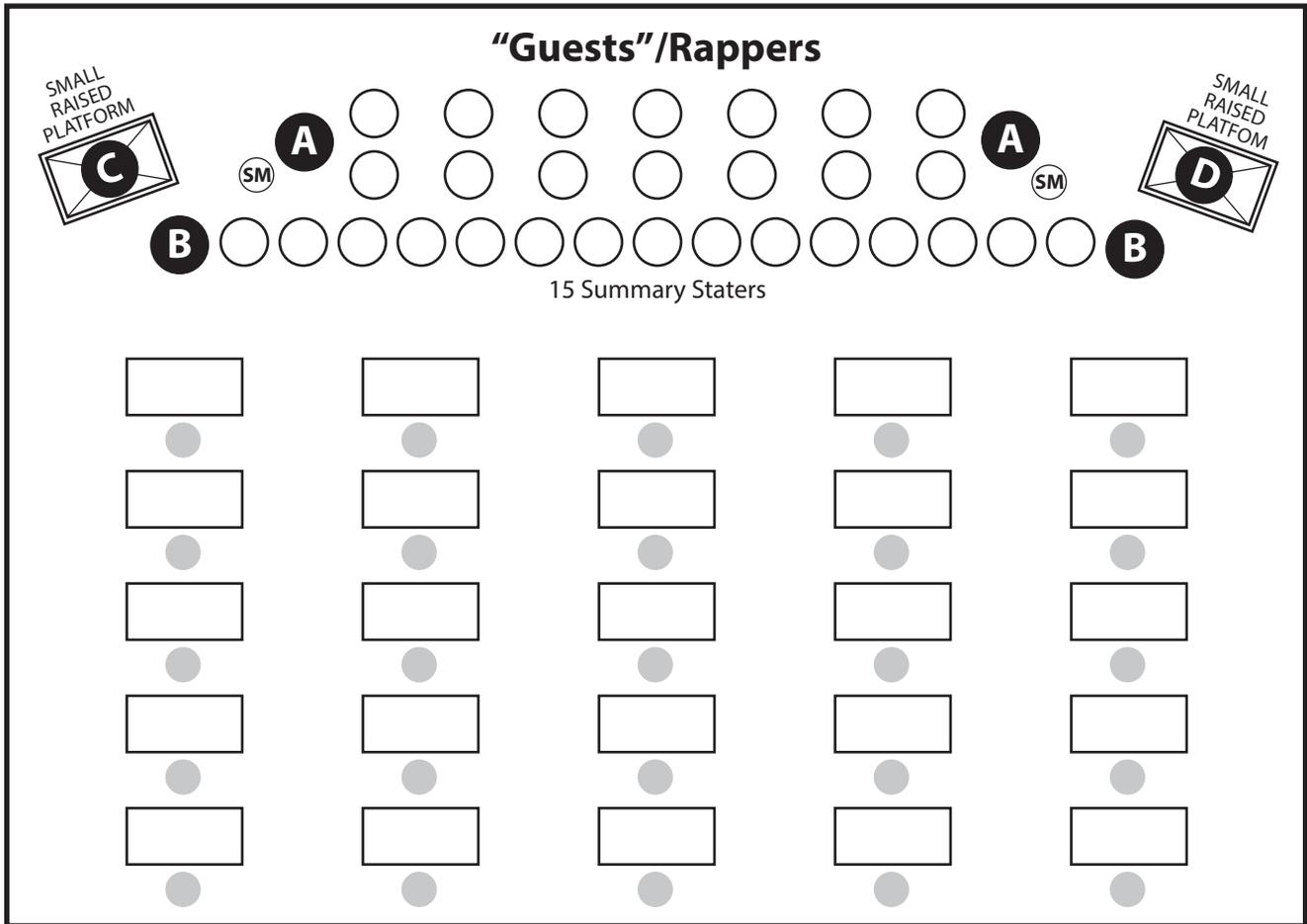
Now it’s time for you to learn the details of the war’s causes, course, and consequences in a format—rap—that will capture the essence of the war and thrust you and your classmates into roles of some of the conflict’s most notable personalities and fictional composites, showcasing the likes of Dolley Madison, Napoleon, an impressed sailor, and even the charred remains of the White House. So let’s go back to 1812!



Damage to the U.S. Capitol building after the burning of Washington

Image Source: U.S. Capitol after burning by the British. By George Munger, 1814, courtesy of the Library of Congress, LC-DIG-ppmsca-23076.

# Schematic



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## Suggestions

- "A" section: fourteen guests are seated and stand on small raised platforms (C, D) just before speaking.
- "B" section: fifteen summary statement speakers
- Use a beat for each guest. Encourage dramatic performances.
- Film activity.
- Insist on applause after each rapper.

## Characters needed

- 14 guests/rappers
- 15 summary statement speakers
- 2-3 narrators
- 1-2 stage managers (to get rappers on platforms)

# Versifying the War of 1812

The purpose of this Activator is to capture the essence of events and characters who played a vital role in the War of 1812. If you are one of those chosen to read/perform a poem about the war, you are now given three options for presenting your poem:

- 1) Read and present the poem as written.
- 2) Keep the poem's framework but add your own lyrics to embellish and flesh out the poem's meaning and scope.
- 3) Ignore the poem you've been given altogether and compose your own work. Make it about the same length but make sure you use the historical data from the original poem and from the "Who I Am" section at the top of your particular **Guest Profile Sheet**.

The choice is yours. Regardless of which option you choose . . .

- 1) Give it your best shot!
- 2) Be dramatic in your presentation.
- 3) Memorize the poem if you can; avoid reading straight from the sheet.
- 4) Write your poem in rhyme or free verse.
- 5) If you want your poem to be legitimately hip-hop or rap, crowd your lyrics with lots of rhyming words, metaphors, and similes. Make reference to historical parallels, contemporary life, and culture.
- 6) Bring in your own recorded hip-hop beat to use as you perform.
- 7) Perform your work as if you are in a Slam Poetry or Poetry Out Loud competition. Enlighten, insert humor, elevate and inspire us, the eager audience.

Some last words:

One poet/scholar once wrote: "Poetry is the use of language with the most possibilities."

# Narration/Script

Hello and welcome! (*pause*) Our purpose today is to examine with you, our audience of scholars, the causes, course, events, consequences of, and participants in the War of 1812. It was one of America's forgotten wars, sandwiched in between the American Revolution and the Civil War. In general, both sides—British and American—were unprepared and went into the war reluctantly. Once in the war, both sides gave less than their best effort. For the British, this attitude can be explained away by the fact that they were at the time also fighting Napoleon's army and navy in Europe. So, the Brits sent their "B" team to America.

Some historians have called the War of 1812 "silly," unnecessary, futile, and inconsequential, and the study of it nothing less than mind-numbing. We're going to change that attitude. Now that we've read the background, let's meet the "stars"—the characters and personalities—who played key roles in this war. It's time for introductions! (*At this point, students playing these fourteen key roles will, in order of their appearance, stand and introduce themselves, ["WHEN I'M INTRODUCED"] starting with Napoleon Bonaparte.*)

Thank you, guests. (*pause*)

Now let's go back

To the actual beginning

To look at the causes

In the war's first inning.

Who better to tell us about the War of 1812's origin in European affairs than French emperor Napoleon Bonaparte. He was a main player in the fierce struggle between France and Britain, a war raging on land and the seas around Europe. The United States, at this time, was gaining strength commercially. Now it had to face the prospects of its economy nearly shutting down from a series of decrees and orders either limiting or forbidding trade with Britain or France. Both Napoleon's Continental System and Great Britain's Orders in Council threatened to ruin American commerce at sea. The growing prosperity of the young nation was essential and its international trade made this happen. Certainly, these actions served as one cause of the War of 1812. Let Napoleon Bonaparte sum it up for us. (***Napoleon performs his rap song.***) Thanks, emperor.

Moving on to another cause of this war: the impressment of American sailors. Attracted by high wages, better food, and more kindly treatment aboard U.S. vessels, British sailors were tempted to desert their ships in American harbors and enter U.S. service. Because of this common occurrence, British captains had orders to stop neutral ships and make thorough searches for deserters. Owing to the difficulty of distinguishing between Englishmen and Americans, many "impressed" sailors were native-born Americans. Some estimate that between 1803 and 1810 perhaps five thousand Americans were impressed (forced into service). One incident between the American ship *Chesapeake* and the British *Leopard* resulted in an attack when the American captain refused to permit his vessel to be searched. This incident, during which at least three sailors were taken off their ship, infuriated the American public. Let's hear one impressed sailor's story from William Ware. (***William Ware performs his rap song.***)

What an angry man he was. (*pause*) A third cause of the War of 1812 was the belief—especially in the West—that the British had been inciting Indians for years to attack American frontier settlements. Though there was little to support this contention, except for some British guns and powder found by General Harrison after the Battle of Tippecanoe in 1811, the mere rumor was fuel for the so-called War Hawks in Congress to demand war. These young, hothead politicians representing the South and the West were on fire for a new war with an old enemy. They were determined to wipe out a renewed Indian threat to pioneer settlers. One way these militant War Hawks—like John C. Calhoun, Peter B. Porter, Felix Grundy, and Henry Clay—could remove the Indian menace was to wipe out their Canadian base. After all, Canada was a lush prize—so near, so desirable, and so apparently defenseless.

The cry of “On to Canada!” soon became the War Hawks’ chant in Congress, putting pressure on President James Madison to ask Congress for war. These War Hawks, with enough support from other sections, except New England, finally engineered a declaration of war in June 1812. The War Hawks, like Speaker of the House Henry Clay, were important factors in the United States going to war. They beat the drums. (**Henry Clay performs his rap song.**)

The War Hawks had their day. Americans went to war for these reasons and few others. Not everyone, however, supported this second war for independence. Many in the mid-Atlantic states and most of seafaring New England damned the war. New England Federalists, concerned about the slipping away of political power, were decidedly pro-British. Now with economic decrees and embargoes restricting trade and profits, they opposed the war, which they called “Mr. Madison’s War.” In some cases, New Englanders refused to send troops, supplies, and foodstuffs to fight in Canada. This gesture, enabling British armies to invade New York, earned them the label “traitors.” That about right, Amos Marsh? Do profits dull patriotism? (**Amos Marsh performs his rap song.**)

New England’s resistance aside, the Americans, once in the war, fared poorly. They were so unprepared. Expecting to invade and conquer Canada in short order, and then dictate peace terms in Quebec, the United States reaped the results of a weak and untrained military force. The Canadian campaign brought one disaster after another. One U.S. general, William Hull, disgracefully surrendered Detroit and over a thousand soldiers to an equal number of British and Indian combatants. Within two months, another poorly conceived and executed battle near Niagara produced a second military disaster. The next year—1813—started no better, with defeats at the Raisin River, York (now Toronto), and Williamsburg.

Fortunately for the Americans in 1813, they met more success at sea and on lakes. In September, a fleet of nine ships, led by Master Commandant Oliver Perry, waged a naval battle against the British force and, after a three-hour fight, got the British to surrender. That same month, on land, an American army led by General William Henry Harrison regained Detroit and, following his enemy into Canada, defeated the British and then Indian allies under Chief Tecumseh at the Thames River. By late October 1813, the United States had recaptured the area around Detroit as well. Though these victories were few, Americans were heartened by feats of their small navy at sea, notably by Captain Isaac Hull and Stephen Decatur in 1812. Another officer, Captain James Lawrence, in a sea battle off Boston Harbor, couldn’t pull out a victory, but as he lay mortally wounded,

spoke the inspiring words, “Don’t give up the ship!” Unfortunately, a new and untrained crew on the *Chesapeake* caused the Americans under Lawrence to surrender. (***Captain James Lawrence performs his rap song.***)

Up to 1813, a headline summing up the war as Americans saw it might be: LOSSES ON LAND, SOME VICTORIES AT SEA. One major exception to this terse summary was General William Henry Harrison’s land victory in the northwest over a large force of British soldiers and Indian allies, the latter led by the legendary Shawnee chief, Tecumseh. The encounter was called the Battle of the Thames. Highlighted by the role of a spirited and sharp-shooting contingent, Americans fought hand-to-hand for an intense hour before the firing and action stopped. When the smoke cleared, the enemy had evacuated, leaving Harrison’s army holding the field of battle. The Indian leader, Tecumseh, was killed—one reason this battle was a turning point in the war. It did not push the British out of Canada, but in some ways it preserved the future states of the Old Northwest (Indiana, Illinois, Wisconsin, Michigan, and Ohio). It was a magnificent and important victory, was it not, General Harrison? (***General William Henry Harrison performs his rap song.***)

Most often, wars are fought on land and on the seas—a two-front war. Most of the land battles of this war were fought in strategic regions near or at the U.S./Canadian border, in the Mississippi Territory near the Gulf of Mexico, and around major cities in the United States. Other “battles” were fought on the home front, in the everyday lives of ordinary people and political leaders who never fired a shot at the British or Indians. For the most part, these Americans were deeply affected by the war. To be sure, the war brought widespread economic hardship. The British blockade of U.S. ports limited international trade, and this fact compounded the problems of New England merchants and shippers. No wonder people from this region of the United States opposed the war and any embargo legislation.

During the war, many goods became scarce or were too expensive to buy. Because of the suffering and the doubts many had about entering this “second war for independence” against Britain, the American nation was severely divided. Critics hounded President Madison. A frail little man with a towering intellect, Madison bore the brunt of the boo-birds. Many blamed him for allowing the British to invade and then burn the nation’s capital after he and his wife, Dolley, fled. Yet the home front survived and many managed to make lasting contributions. Correct, Dolley Madison? (***First Lady Dolley Madison performs her rap song.***)

The invasion and attack on our nation’s capital stunned Americans. This event marks the only time an army of a foreign power, other than the British during the Revolution, has invaded and occupied the capital of our country. Burning our capital, however, remains unique. Thanks to Dolley Madison, many documents and treasures were saved, including the showpiece of the President’s House, Gilbert Stuart’s famous painting of George Washington. Still, how could this happen—an enemy marching into Washington, D.C., burning government buildings? After invading the United States from the sea and winning the Battle of Bladensburg, a British force under General Robert Ross and Admiral George Cockburn covered the short distance to the American capital in a few hours. Once in the abandoned city, what the British did next shocked Americans, and even some Europeans. Seemingly of no particular strategic value, Washington, D.C., was then ransacked, and many vital government buildings were burned. Torched! Included in these buildings were the U.S. Treasury

Building, the Capitol itself, and the President's Mansion, commonly known today as the White House! Is that all true, White House? (***The White House performs its rap song.***)

With many of its buildings gutted by fires, including the President's House, Washington was vacated by the British, who next turned their attention on other prominent U.S. cities, notably the seaport of Baltimore on Chesapeake Bay, not too far from Washington. At this time, a surge of American patriotism arose from the destructive attack on the capital. As a result, legions of volunteers poured into Baltimore to help defend the city. The focal point for this defense was Fort McHenry at the harbor's entrance. As British warships lined up to bombard the fort, Americans prepared to resist. One American eyewitness to this resistance was a passenger on an attacking British ship. Lawyer Francis Scott Key was empowered to be the U.S. agent in a prisoner exchange, negotiating for the release of an American doctor. British officials agreed to release Dr. William Beanes, but only after the battle for Fort McHenry the next morning. What a memorable night and dawn it was—September 13 and 14, 1814—with the bombardment of Fort McHenry and Key's famous poem on "the bombs bursting in air" and seeing the huge flag still snapping in the morning breeze. (***Francis Scott Key performs his rap song.***)

The stubborn American defense of Baltimore at Fort McHenry was considered a victory. Almost at the same time, Americans were savoring another victory, this one in Plattsburgh Bay on Lake Champlain. As Americans focused on the burning of the Capitol and the bombardment of Fort McHenry, action was also taking place in upstate New York, where a ship-building race between the two warring nations had produced large state-of-the-art super frigates. At stake: control of the lakes and defense of New York State. For this, Americans put their confidence in U.S. Navy Commodore Thomas Macdonough, who had brought his fleet into Plattsburgh Bay on Lake Champlain to battle the new British super frigates, notably the 1200-ton, 160-foot-long, 37-gun *Confiance*. In a key battle of Plattsburgh on September 11, 1814, Macdonough's four ships (*Saratoga*, *Eagle*, *Ticonderoga*, and *Preble*) executed a daring maneuver known as "winding ship"—turning the *Saratoga* around while at anchor. This move was decisive. He defeated the four-ship British fleet in a two-and-a-half-hour slugfest. It was a battle so furious that the captain of the *Confiance* was killed, and his ship was hit with at least 105 broadsides. Before the battle commenced, Macdonough inspired his sailors with the banner he ran up the mast. It read, "Impressed seamen call every man to do his duty." The small British fleet had been pounded into defeat. Congratulations, Commodore Macdonough for a great naval victory! (***Commodore Macdonough performs his rap song.***)

The tide of war now seemed to favor the United States. Yet, with the British defeat of Napoleon in Europe, fresh British troops began to pour into North America. Would the British now be favored? The fact remains, however, that by the end of 1814, both sides were weary of war—the British especially, after fighting the French for years. Perhaps one more crucial battle would decide this war—a battle for control of the West and the Mississippi River trade. So it was that the Battle of New Orleans came about from a final British invasion plan aimed at the mouth of the mighty Mississippi. Some of Britain's best troops were preparing to attack New Orleans, a city founded in 1718 by the French, exchanged by treaty to Spain, then returned to France, before being sold to the United States in 1803. French-speaking and with a diverse population including whites, Indians, blacks, Caribbean immigrants, and even pirates, New Orleans readied itself to fight the redcoat invasion.

There also to help organize resistance and man the lines of defense were American troops led by General Andrew Jackson.

Leading one of these fighting contingents was one of the region's most colorful, if not notorious, citizens, "businessman" and privateer Jean Laffite. Laffite played a significant role by supplying his own men, cannon shot, and powder to defend his city. The battle itself started in a fog, some say the American's most valuable "ally" that January 1815 day. When the fog eventually cleared, the British army was exposed and there followed a "murderous discharge" from the lines of American cannon and rifle fire. Even the British commander, Sir Edmund Pakenham, was killed by a cannonball. The battle was essentially over in a few hours. It was a lopsided American triumph and, as it turned out, the last battle of the war. It was a national baptism of sorts and made the Americans feel like they had won the entire war, not just a few land and sea battles. It purged the memories of defeat, ineptitude, and surrender that dotted the first two years of war. The pirate—oops—privateer Laffite was certainly a factor in the American victory. (***Jean Laffite performs his rap song.***)

It is a fact that the Battle of New Orleans was fought after a peace treaty ending the war was signed. Negotiators at Ghent, Belgium, had agreed to a truce a few weeks before the British assault on New Orleans. For several reasons, Britain was ready to bring this war to a close. Macdonough's victory at Plattsburgh and high taxes in Britain were certainly factors. In the United States, "Mr. Madison's War" had divided the nation. Both sides suffered a calamitous drop in trade. Interestingly, the Treaty of Ghent, signed December 24, 1814, mentioned none of the issues that caused the war—free trade, impressments, and Indian attacks. The treaty was more of a truce, a cessation of hostilities. (***The Treaty of Ghent performs its rap song.***)

So New Orleans was fought about three weeks after the treaty ending the war was signed. There was no telephone or telegraph available to carry the news across the Atlantic. Keep in mind that the U.S. Senate had neither seen nor ratified the treaty before the battle took place. For the Americans, the war had lasting significance, despite the fact that it ended in a tie and solved no prewar issues. Let's ask two eminent historians to give us some perspectives, some context, to this conflict, this War of 1812, our second war for independence. (***Professors Amelia Budd and Grant Beecher perform their rap song.***)

Well, that's it—an incisive and dramatic, if not poetic, look at the causes, course, and consequences of the War of 1812. We hope you learned something important about this so-called forgotten war, one in which Americans fought and survived a second war for independence. From this conflict the United States emerged, if not triumphant, at least more energetic, patriotic, confidently American, hopeful, and destined for future glory.

So . . .

In the war we have studied just now,  
Both sides did continually vow  
To try as they might  
To win every fight,  
But the war was a tie, anyhow.

# Guest List

GUEST	FOCUS
<i>Napoleon Bonaparte</i> , emperor	Causes of the War of 1812
<i>William Ware</i> , sailor	Impressments
<i>Henry Clay</i> , War Hawk	Cause of the War of 1812
<i>Amos Marsh</i> , New England shipper	War dissent
<i>Captain James Lawrence</i> , United States Navy	Important naval battle
<i>William Henry Harrison</i> , U.S. Army general	Battles of Tippecanoe and the Thames
<i>Dolley Madison</i> , president's wife	Life on the home front; White House heroine
<i>The White House</i>	"Torching my walls;" destroying the capital
<i>Francis Scott Key</i> , lawyer and lyricist	Bombardment of Fort McHenry; "The Star-Spangled Banner"
<i>Commodore Thomas Macdonough</i> , United States Navy	Battle of Plattsburgh
<i>Jean Laffite</i> , patriot-pirate	Battle of New Orleans
<i>The Treaty of Ghent</i>	Truce negotiating and peace
<i>Amelia Budd</i> and <i>Grant Beecher</i> , historians	Perspectives on the war; impact

# Guest Profile Sheets

## Napoleon Bonaparte, Emperor of France

### WHO I AM

I, Napoleon Bonaparte, came to power at the end of the Revolution that rocked France. In 1795, I was an officer of the French army when I was called on to break up the mob by ordering my troops to fire a "whiff of grapeshot." This action soon helped me rise like a meteor to become a general at the age of twenty-seven. After victories over the British in Egypt, I used my talents, superior brain, and charisma to become, at age thirty, virtual dictator of France. By 1804, I was emperor with absolute power. As emperor, I continued war with Britain and their allies, and I even attacked Russia in 1812, the same year the Americans and the British went to war. Be assured, France and I, Napoleon, played a role in the cause of the War of 1812.

**WHEN I'M INTRODUCED:** "I'm Napoleon, the Emperor of France."

**MY RAP SONG (Tip: Use a French accent.)**

I am Napoleon  
Zee Emperor of Frahnce  
Involved in war  
And not by some chahnce.

Frahnce will win  
On land and seas.  
We'll beat zee world  
With armies and decrees.

With Orders in Council  
Zee Brits struck back.  
Neutrals can't trade  
Zair ships we'll attack.

Americans were hit,  
Interrupting zair trade.  
Even zair embargo  
Didn't bring aid.

Zees economic blows  
Made zee U.S. decide  
To war against Britain  
To stop zee trade slide.

Zay bribed both sides  
With Bill No. 2  
But since news was slow  
Tensions still grew.

Zair Congress did act  
Voting for war  
So, Yankee doodles & Brits  
At it once more.

*Translation:*  
I am Napoleon  
The Emperor of France  
Involved in war  
And not by some chance.

France will win  
On land and seas.  
We'll beat the world  
With armies and decrees.

With Orders in Council  
The Brits struck back.  
Neutrals can't trade  
Their ships we'll attack.

Americans were hit,  
Interrupting their trade.  
Even their embargo  
Didn't bring aid.

These economic blows  
Made the U.S. decide  
To war against Britain  
To stop the trade slide.

They bribed both sides  
With Bill No. 2  
But since news was slow  
Tensions still grew.

Their Congress did act  
Voting for war  
So, Yankee doodles & Brits  
At it once more.

## William Ware, Impressed Sailor

### WHO I AM

Aye, I'm William Ware, born in Maryland, and I served in the U.S. Navy until the Royal Navy impressed me against my will. If you don't know, impressments occurred when U.S. sailors were "enlisted" against their will, literally taken off our ships to be sailors in the British navy. In my case, the British stopped the USS *Chesapeake* and claimed me and two others, John Strahan and Daniel Martin. At one time Martin had enlisted in the British navy. I did not. So I was kidnapped into "brutal bondage," an action against other Americans repeated over and over before 1812.

**WHEN I'M INTRODUCED:** "I'm William Ware, impressed U.S. sailor . . ."

### MY RAP SONG

How degrading it was  
To be stopped and seized.  
It was against the law  
Of freedom of the seas.

Impressment was feared,  
Forcing men to "enlist,"  
Roughed up and abducted  
With clubs and the fist.

The Royal Navy  
Needed men for their war.  
Harsh treatment made desertion  
Too appealing to ignore.

While aboard the *Chesapeake*  
I was part of the crew  
Until after a fierce battle  
My abduction ensued.

I was kidnapped. I was  
Taken off a Man O' War.  
My rights were violated  
Causing a big uproar.

So, impressment, I learned,  
Was an uncivilized notion  
So, stay below decks  
Or be kidnapped on the ocean.

## Henry Clay, Congressional War Hawk

### WHO I AM

I'm Henry Clay, with a distinguished career ahead of me as a "Great Compromiser." I was the magnetic Speaker of the House of Representatives when I, along with other "War Hawks" like John C. Calhoun, Peter B. Porter, and Felix Grundy, clamored for war with Great Britain. We were mostly from the West and South and came to Washington, D.C., determined to do something about our loss of honor on the high seas. Impressment of our sailors, repressive trade decrees, and British support of hostile and marauding Indians in the northwest, all needed to be addressed when we were elected in 1810. We changed the face and direction of the House and the nation, to the dismay of others, especially New Englanders who dubbed us "young hotheads." We call ourselves . . . War Hawks!

**WHEN I'M INTRODUCED:** "I'm Henry Clay of Kentucky, a 'War Hawk' eager for war."

### MY RAP SONG

With rights on the line  
And our honor at stake  
We came to Washington—  
Some decisions to make.

Young "hotheads" we were  
From the South and the West  
Calling for *war!*  
And pounding our chests.

Harrison won victory  
O'er Indians at Tippecanoe  
Validating our belief  
Brits were in on it too.

Let's go to war now!  
To win on land and sea  
Attack the Indians in Canada  
So we can live free!

Expansion seemed our goal  
To spread our dream.  
The West will be ours  
Says Henry Clay—that's me!

## Amos Marsh, New England Shipper

### WHO I AM

Like most New Englanders who were involved in shipping and trade with nations like France and Britain, we opposed going to war. War meant trade restrictions, and in the years leading up to the war we experienced not only Europe's trade decrees, limiting our trade, but also America's own disastrous embargo. Trade is our livelihood. Our opposition to the war sharply divided the United States. New England happened to be the stronghold of the Federalist Party, a political force not in vogue during the presidencies of Jefferson and the current Madison administration. In protest against the war, some New Englanders refused to send its sons to fight. We saw the War Hawks in Congress as hothead expansionists with designs on Canada—imagine! Almost to a man, we viewed the War of 1812 as Mr. Madison's War and thus folly. To avoid economic ruin to our section, we'll continue to trade with Britain. It's a matter of survival.

**WHEN I'M INTRODUCED:** "I'm Amos Marsh, New England shipper, and I'm headed for the poor house."

### MY RAP SONG

Aye, we do oppose this war  
New Englanders to a man.  
We're outvoted by the War Hawks  
Expansion is their plan.

Taking Canada is but folly.  
Fighting Britain, we abhor.  
Call us traitors, if you will,  
We oppose "Madison's War."

The embargo hurt us royally  
'Cause trade's our way of life.  
Can you blame us for our risky stand  
To avoid this war and strife?

So ply our trade we will,  
Shipping goods illicitly.  
Our fellows even talked secession  
Though it never came to be.

## Captain James Lawrence, U.S. Naval Officer

### WHO I AM

At the age of thirty-two, I, Captain James Lawrence, U.S. Navy, became one of America's youngest American naval officers, fighting the mighty forces of the British navy. Often compared to other notable naval captains in the war—namely Thomas Macdonough, Oliver Perry, and Stephen Decatur—I distinguished myself in a battle I lost and died in! Yet, my dying words, now the proud motto of the U.S. Navy, were on the flag of Perry's ship during his great victory on Lake Erie a few months after my demise. The words? "Don't give up the ship" (and "Fight her till she sinks"). All this action took place in June 1813, while I was captain of the USS *Chesapeake* just outside Boston Harbor, where I was up against the *Shannon*, captained by Philip Broke. It was a fateful day.

**WHEN I'M INTRODUCED:** "I'm Captain James Lawrence, martyr for the U.S. Navy."

### MY RAP SONG

I'm Captain James Lawrence  
And I'm here to say  
I lost and I died  
That fateful day.

Before my stand  
Perry was in charge  
Of building a fleet  
And making it large.

Control of the Lakes  
Sinking Britain's fleet  
Would spark our efforts  
And stave off defeat.

Frigates aplenty  
Battling ship to ship  
Cheered on by feats  
Of great seamanship.

My defeat lived on  
In successes at sea,  
Victories by Decatur  
And Perry on Erie.

Perry managed victory  
'Tween the two naval powers.  
"Met the enemy," he said  
"and now he is ours."

I inspired Perry  
In the motto he displayed.  
"Don't give up the ship," I said  
As crew members prayed.

My motto and my death  
Lifted a drooping cause  
Snatching unlikely successes  
From defeat's heavy jaws.

# William Henry Harrison, U.S. Army General

## WHO I AM

When war broke out with Britain in 1812, I was the young (age twenty-seven) governor of the Indiana Territory. A crushing victory over British-backed Indians at the Battles of Tippecanoe (1811) and the Thames (1813) solidified my reputation as a great soldier and hero. After the war, I would serve as congressman, senator, ambassador, and briefly—thirty days—as the ninth U.S. president. My glory days go back to Indiana and those vital battles I won.

**WHEN I'M INTRODUCED:** "General William Henry Harrison, Indian killer and later President."

## MY RAP SONG

I was born a winner  
And trained to shoot and kill.  
Won a few great battles  
Using my military skill.

But out in Indiana,  
Where Tecumseh's leadin' reds,  
We shut the varmints down  
By shootin' 'em dead.

There at Tippecanoe  
Before the big war  
I beat the frisky natives—  
And the Prophet ain't no more.

Tecumseh escaped being captured  
To fight in two more years  
So we beat him later on  
Using crack-shot volunteers.

This bloody fight was crucial—  
The Battle of the Thames (*pronounced: temz*)  
Hand to hand we fought  
One of my military gems.

So Tecumseh met his maker  
Our men did their very best.  
It was key to our vital victory  
To save the Old Northwest.

I became a U.S. hero  
And my shining star arose.  
President a mere thirty days!  
But that's the way it goes!

## Commodore Thomas Macdonough, U.S. Navy

### WHO I AM

As the U.S. Navy's master commandant, I, Thomas Macdonough, saw service in the Mediterranean under Stephen Decatur before earning honors to command a small fleet for key battles on Lake Champlain from 1812 on. Clever, spontaneous seamanship was my trump card in sea battles and I used it effectively in besting Sir George Downie's flagship, the *Confiance*, and his three other ships at the pivotal naval encounter at Plattsburgh. For my efforts, I became the toast of the American nation. Former president Theodore Roosevelt would eventually write about me in his book, calling me "the greatest figure in our naval history." Such lavish praise for a common sailor!

**WHEN I'M INTRODUCED:** "I'm Commodore Thomas Macdonough, U.S. Navy and seaman extraordinaire."

### MY RAP SONG

A key battle was brewing  
On Champlain, the lake.  
A war 'tween frigates  
With everything at stake.

With D.C. on fire,  
Baltimore under attack,  
This battle loomed large  
Getting our mojo back.

With faith in the navy  
In our hour of need  
Put me in charge  
And we'll surely succeed.

The Battle of Plattsburgh  
That's how it's known,  
Ships pounding each other  
In a wet battle zone.

As we lined up for battle,  
*Saratoga* leading the way,  
We let the Brits come close  
Out there on the bay.

Before it commenced,  
I inspired my crew  
"Do your duty," I said,  
"for the red, white, and blue."

Seizing the moment,  
My ships fired away.  
We lobbed 24 pounders  
To help win the day.

Their huge *Confiance*  
outweighed us forty ton  
But we outmaneuvered it  
And the battle was won.

Their captain was killed  
by a ball, he was hit.  
I, too, took a blow  
But rose, full of grit.

Our victory did change  
The balance of power.  
New York was spared  
By me—"man of the hour."

# Dolley Madison, Wife of the Fourth President

## WHO I AM

Small in stature, but huge in intellect and influence, my husband, Virginian James Madison, became the fourth U.S. president in 1809, just in time to deal with economic embargo and the slippery road to war against Britain. Once in the war, my Jimmy faced a divided nation and one military blunder after another. In 1814, he and his vivacious and attractive wife Dolley, me, fled the White House—then called the President’s House or Mansion—just before British troops ransacked and burned it and the Capitol building in Washington, D.C. I am credited with remaining cool under fire as I personally saved some key treasures, escaping with them just in time. My husband, thank goodness, completed his presidency just as a wave of patriotism hit the United States following the war.

**WHEN I’M INTRODUCED:** “I’m Dolley Madison, the president’s wife. I saved George Washington!”

## MY RAP SONG

I’m asked as the First Lady  
Miss Dolley, they all say,  
What was it like during the war  
Back in your own day?

Well, my husband was president  
And the war was raging on  
The “home front” suffered greatly  
So the good times they were gone.

Attacked by the critics  
My “Jimmy” was hurt.  
I guess politics are messy  
Slinging the muddy dirt.

But women were there  
Doing their bit  
Backing their men  
And keeping them fit.

So, too, were the blacks  
Serving our cause—  
In the navy, especially  
And fighting like “dogs”

Some Indians, too  
Sided with us  
The Oneida, the Mohawk  
Made victories a plus.

But with our cities in peril  
And open to attack  
Even the White House could be  
Burned and ransacked.

As the British drew near  
To burn our D.C.  
I performed my duty  
For the “land of the free.”

Treasures I saved  
Like a portrait of George  
The man we call hero  
At cold Valley Forge.

So do remember me  
For more than my looks.  
The Madisons deserve honor  
In your school’s history books.

# The White House

## WHO I AM

Called in the early 1800s the President's House or Mansion, I—the White House—was built in Washington, D.C., in the 1790s as the residence for future U.S. presidents. Though I have had a glorious history over the two hundred plus years since my construction, and within my walls experienced personal lives of presidents and their families, my darkest hour came in August 1814, when an invading British force burned several government buildings, including the Capitol and me—the White House. At the time, James and Dolley Madison were residing in me but had to flee. Soon after, I was torched. I still have burn marks on me. It pains me just to recall those distant memories.

**WHEN I'M INTRODUCED:** "I'm the President's House, aka the President's Mansion or the White House."

## MY RAP SONG

Well, it "burned" me up,  
What they did that day  
Set buildings aflame  
Turning white to gray.

To defend D.C.  
We were unprepared  
The Brits had a plan  
And few were spared.

In rode the Redcoats  
Lacking any pity  
Scanning the streets  
Of our empty city.

The Capitol went first  
The Brits did their chores  
Firing rockets, starting fires  
And charring both floors.

Going up in flames  
Went "wings" and nooks,  
Vital records, too  
And the Library's books.

As the winds sent sparks  
Up and down the street  
The Redcoats looked about  
For something to eat.

My time was coming  
I was next in line  
So the enemy came in  
And started to dine.

After they ate  
Admiral Cockburn gave an order  
To burn me good  
Even bricks and mortar.

So torches were lit,  
Glass was shattered,  
Everything destroyed  
That really mattered.

Soon dancing fires  
Gave a dull orange glow  
And showers of sparks  
As a wind did blow.

"I want to see it blaze,"  
Said Admiral to his men.  
It was ordeal by fire  
I was about done in.

As the enemy cheered  
And fires grew bright  
I'll never, never forget  
That hot August night.

## Francis Scott Key, Washington Lawyer

### WHO I AM

I, Francis Key, was appointed to negotiate for the release of a Maryland doctor arrested during the retreat from Washington, D.C. I was on one of the many British ships shelling Fort McHenry, a harbor fortress protecting the city of Baltimore, in September 1814. The bombardment I witnessed continued all day and night of September 13 and 14. When dawn came and there was a pause in the bombing, I saw that the large American flag was still waving on its staff, indicating that the fort, far from being destroyed, was in fact a symbol of resistance. It had not fallen. Being a part-time poet, I found time to describe my “nighttime fears” and the subsequent thrill of what I saw in the morning. I get chills just remembering the experience.

**WHEN I’M INTRODUCED:** “I’m Francis Scott Key, lawyer and part-time poet—(sing) “Oh say can you see?”

### MY RAP SONG

The fort was shelled  
Through night and dawn  
I watched it all  
From the ship I was on.

Baltimore was attacked  
As a key U.S. port.  
The flag was a target  
From atop the old fort.

A lawyer I was,  
And a part-time poet.  
I wrote down thoughts  
For posterity . . . I owe it!

I stood on the deck  
Amid the rockets’ red glare  
I watched in amazement  
Bombs bursting in air.

“The Star-Spangled Banner”  
Stood through the night.  
The colors were vivid  
In dawn’s early light.

How proud I am  
When the “song” was done.  
Hey, now it’s our anthem  
Since nineteen thirty-one.

## Jean Laffite, Louisiana Privateer/Pirate

### WHO I AM

I am Jean Laffite (pronounced: la feet), a colorful mixture of Louisiana smuggler, pirate, privateer, and as it turns out, American patriot. I aided the American defense of New Orleans against the British in late December 1814 and early January 1815. By supplying men, arms, and powder for General Andrew Jackson's efforts, I provided an invaluable service that helped lead the Americans to victory. Interestingly, I was earlier offered money and a commission in the British navy to help defeat the Americans. I refused, of course, and instead sent vital documents outlining British strategy to American authorities. During the actual battle on January 8, my men and I fought with distinction. Later, President Madison issued a public pardon for us pirates, acknowledging that as "pirates" we had participated in illegal activities over the years prior to 1815.

**WHEN I'M INTRODUCED:** "I'm Jean Laffite, pirate and smuggler, but in the end . . . an American patriot."

### MY RAP SONG

They call me a pirate  
But I'm just Jean Laffite  
Defending New Orleans,  
Ensuring Britain's defeat.

The Brits want the city  
And the trade in the West  
This river city's crucial  
So we'll give it our best.

Behind breastworks and in swamps  
United we stand  
Resolute for victory  
Determined to a man.

As tradition would have it  
They came in straight rows  
We girded for action  
Alert on our toes.

As the early fog cleared  
And the Redcoats charged  
We fired our rifles and  
Our cannons discharged.

Amidst "volumes of smoke"  
And "sheets of fire"  
We kept up the heat,  
Jackson there to inspire.

Even Sir Edward  
The young British "boss"  
Was killed in the slaughter  
A factor in their loss.

When it was over  
After two and a half hours  
The city was saved  
And the victory was ours.

Now Jackson's a hero  
His star's on the rise.  
Expansion's a must  
And the West's now a prize.

This was the last battle,  
Last chapter to an age.  
The Era of Good Feelings  
Now starts a new page.

# The Treaty of Ghent

## WHO I AM

I'm that piece of paper—the actual treaty that was hammered out and signed in Ghent, Belgium—in the fall and early winter of 1814. The negotiators from Britain and the United States signed me on Christmas Eve; the British government formally ratified me on December 28, 1814. Because of slow communication, news of the truce came too late to stop the Battle of New Orleans, fought on January 8, 1815. When President Madison received word of me on February 11, he already knew of General Jackson's victory. That means New Orleans was fought two weeks after the truce! Think about how history would be altered if we had telephones or the Internet in our day. In reality, however, there wasn't much in me. Causes of the war—impressments, open trade, Indians in the Old Northwest—were not addressed. All these men at Ghent agreed on was an end to hostilities and the restoration of territory taken during the war.

**WHEN I'M INTRODUCED:** "I'm the Treaty of Ghent . . . and I have a tardiness problem."

## MY RAP SONG

I'm the Treaty of Ghent,  
Finally signed between  
The U.S. and Brits  
In 1814.

There were Clay and Adams  
And some others, too  
Like Rush and Gallatin  
As part of their crew.

Few issues were addressed;  
The causes of the war  
Were left on the table  
Just like before.

No mention of Indians,  
Impressment at sea,  
Or American rights  
To travel as free.

Yet problems were solved  
As the years went by  
Ties were strengthened  
On each other they rely.

## Professors Amelia Budd and Grant Beecher

### WHO WE ARE

We are historians and college professors, specializing in the 1800–1840 era in U.S. history. The War of 1812 has always fascinated us. My husband, Grant, wrote his doctoral dissertation on naval battles in this war. My particular expertise is the Madison administration. So, for good reason, we have been included in this narrative activity. We'll provide the necessary perspective and the context for the war.

**WHEN WE'RE INTRODUCED:** "I'm Budd and he's Beecher. As professors, we love history and the War of 1812."

### OUR RAP SONG

Thanks for the invite.  
We're Budd and Beecher,  
Inserted at the end  
As a special feature,

We are the profs  
To bring the big picture  
With no fancy words  
Or long boring lecture.

The treaty was signed  
But news traveled slow  
So New Orleans was fought  
And left an afterglow.

It overshadowed the treaty  
Jackson's victory did.  
It lifted our spirits  
And gave the war a lid.

But the war solved little  
It ended in a tie  
It left both sides  
Questioning the "why."

It took two and a half years  
And two thousand dead;  
We gained some respect  
As we look up ahead.

The war had impact:  
Free trade for all,  
Impressment fell away,  
And the Indian got small.

The war created heroes  
And a "star-spangled" song.  
Americans felt proud,  
Boastful and strong.

Unified we were now  
And feeling peacock proud.  
We became "independent"  
For crying out loud.

We forged a nation  
Fighting a second war  
Peace with the Brits  
And tradin' once more.

So we're on our own  
British influence less  
We're free to move on  
Sending settlers out West.

Let's wrap this up  
What we needed to say  
We hope this drama  
Has enlightened your day.

# Summary Statements

These statements are to be used near the end of the narrator's script. Stand in a circle and try to speak dramatically.

1. The War of 1812 lasted two and a half years, and both the United States and Britain went into it reluctantly and gave less than their best efforts.
2. Some historians have called it a silly, futile war, full of countless ground and sea battles between inexperienced armies and creaking sailing ships.
3. The War of 1812 was our second war for independence, about thirty-five years after the first.
4. The War of 1812 ended in a stalemate, a tie, yet the war was not as unnecessary and inconclusive as earlier thought.
5. The War of 1812 is a historical subject worthy of serious study.
6. Many of the memorable events—bombardments and battles—took place near or on water.
7. The War of 1812 featured memorable quotes: "We have met the enemy and they are ours," "Don't give up the ship!" and "Oh say can you see?"
8. The War of 1812 featured the only time, except during the Revolution, when an invading army occupied and burned important government buildings, including the White House.
9. President James Madison became a target for critics, who labeled the conflict "Mr. Madison's War."
10. The causes of the War of 1812 can be summed up in six words: "Indian troubles, free trade, sailors' rights."
11. Most of the American victories were won by the U.S. Navy on lakes and created heroes of the winning commanders.
12. The most important land battle, at New Orleans won by General Andrew Jackson, occurred two weeks after the treaty ending the war was signed. News traveled slowly across the Atlantic.
13. The Treaty of Ghent "ending" the war said nothing about the issues that caused the war: Indian trouble, free trade, and sailors' rights.
14. General Jackson's victory at New Orleans made it seem like the United States had won the war and it resulted in a wave of patriotism during the Era of Good Feelings (1815–1830).
15. The War of 1812 launched Americans into eighty-five years of expansion to the Pacific, and they experienced a sectional war, an era of industrialization, and even imperialism with expansion overseas.

# Uncle Sam: America's Symbol



Uncle Sam, half-length portrait, pointing at viewer as part of the United States government effort to recruit soldiers during World War I, with the famous legend "I want you for the U.S. Army."

Besides the flag and the bald eagle, nothing says "America" or "United States" like Uncle Sam: that red, white, and blue character with the tall hat and long goatee. Was he a real person or just an idea from the fertile brain of a cartoonist?

Historians aren't certain about his origins. But it appears that the name and character are based in fact. During the War of 1812, Samuel Wilson (1766–1854) worked in a business that supplied meat to the U.S. military. Apparently, Wilson, about fifty years old at the time, was a subcontractor to one Elbert Anderson, and the letters E.A. and U.S. were stamped on all the pair's army-bound grub. Even then, Sam Wilson was called "Uncle Sam" while he lived in Troy, New York.

Doubts abound that this man, Sam Wilson, was the inspiration for the character he later became. For instance, when Wilson died in 1854, his hometown newspapers in Troy made no mention of the Uncle Sam connection. Of course, the cartoon of Uncle Sam, an invention of artist Thomas Nast (also responsible for our versions of Santa Claus, the Republican elephant, and the Democratic donkey), has little to do with the meatpacker-distributor.

Yet, over the years, Uncle Sam as we know him—white goatee, top hat, star-spangled suit—is one of the most popular personifications of the United States, used over and over, almost on a daily basis, in cartoons all over the world. Sometimes used negatively, Uncle Sam's most famous portrait is on the World War I recruiting poster ("I Want You!") by artist James Montgomery Flagg. Many have called the work "the most famous poster in the world." Whatever his origins, Uncle Sam is America's representative to the world.

Image Source: Recruiting poster. By James Montgomery Flagg, 1917, Courtesy of Library of Congress, LC-DIG-ppmsca-50554.

# Postscript



The Signing of the Treaty of Ghent, Christmas Eve, 1814.

When the Treaty of Ghent was finally ratified by the U.S. Senate (February 1815) the War of 1812 was officially over. The war's legacy and impact—positive and negative—would linger for years, including the myths about the war itself and the personalities involved. Myths—stories about real people or events that are usually untrue—are infused into every nation's history, and the myths that have emerged from this particular war are now ripe for analysis. The record needs to be accurate.

Historian Donald R. Hickey, in his scholarly but entertaining assessment of the War of 1812, *Don't Give Up the Ship! Myths of the War of 1812* (2006), writes about the myths that surround events and characters of this conflict. He postulates that myths about history are really misconceptions, which are based "on legend, faith, or wishful thinking, rather than on hard evidence." With regard to the War of 1812, patriotism during and after the war led to a desire to establish a new national identity by creating and using myths to serve broad national purposes. Exaggerations and embellishments of facts were part of this effort.

Professor Hickey's sound scholarship suggests these realities of long-cherished myths:

- The war being a "second war of independence" is an exaggeration. At no time did the British actually threaten American sovereignty. They were focused more on defeating Napoleon on European battlefields, so they mostly fought a defensive war. Canadians had a far bigger risk; they were resisting American aggression. For Americans, this war was one of survival.
- Impressment of sailors was not a major cause of the war. While it is true that many Americans and British sailors were taken off British ships, the impressment of naturalized Americans was not a major source of controversy. At the time, Americans saw these acts as a price to pay for doing business in the midst of European wars.

Image Source: Painting by Amédée Forestier, Smithsonian American Art Museum.

- The Battle of New Orleans was not fought after the peace treaty officially ended the war. The war didn't end until the treaty was ratified by the U.S. Senate in February 1815, weeks after Jackson's victory in Louisiana.
- The "Star-Spangled Banner" (flag) that flew over the embattled Fort McHenry was not unique in its huge size and was only flown in the early stages of the British bombardment. A smaller "storm flag" was probably what Francis Scott Key saw from an American "truce vessel," not a British warship, from eight miles out (if he saw it at all from that distance). His poetic title was initially "Defence [sic] of Fort McHenry." Not until 1931 did "The Star-Spangled Banner" become our national anthem.
- "Don't give up the ship!" probably did come out of the mouth of a dying Captain James Lawrence as he and his crew were losing to a British ship in a sea battle. He probably said something close to these words several times, but the "pithiest" version became a rallying cry and heroic symbol when Commandant Oliver H. Perry put it on a banner over his flagship. Most likely, they were not Captain Lawrence's last words; he survived for another three days after being wounded. His ship, the *Chesapeake*, was eventually taken by the British, but no American actually "gave up the ship" by surrendering it.
- Perhaps the most common myth was one that emerged soon after the war and passed into history: The War of 1812 was not so much a wasteful and costly struggle but one of victory and glorious triumph. Ignored or not discussed were the actual costs: \$158 million spent and perhaps as many as 10,000 or more killed in two and a half years from battle wounds or disease. Yet, to look at the positives, as Professors Budd and Beecher said in different words during the activity, the War of 1812 was a "watershed" in so many ways. It ended America's lingering insecurity from the 1780s, and it exposed a grit and resilience in the American participants. The nation survived, despite the bungling, mismanagement, ineptitude, and mistakes. The decades following the war came to be known as the "Era of Good Feelings." So, in a sense, the United States emerged from the War of 1812 triumphant.



# Historical Investigation Activity

## *The War of 1812 (1812–1815)*

By Bill Lacey

### Focus Question

Pirate/Patriot Jean Laffite: Did he and his Baratarians contribute significantly to the American victory at the Battle of New Orleans?

### ***Materials Needed for This Historical Investigation***

- **Documents A–E**—*class set*
- **Points to Ponder Response Sheet**—*class set*

### Lesson Plan

#### 1. Getting Started

- Ask students, “What can you tell me about the Battle of New Orleans, the last major confrontation between American troops under General Andrew Jackson and the British army?” Write student responses on the board as spokes emanating from a hub, and discuss those responses.
- Play the 1959 pop hit “The Battle of New Orleans.” Have students listen and write down all the facts they hear about the famous battle—Who fought? What strategies were used? Who won? etc. The song and beat are really infectious—try having students sing along.
- Many believe pirates—notably the Laffite brothers—played a vital role at New Orleans. Discuss the definition of a pirate with your students.

#### 2. Backstory to Use as Instruction

- Jean Laffite (c. 1780–c. 1823) was a colorful combination of several identities. He was, at various times in his life, a privateer (a person with a privately owned ship authorized to attack other ships), pirate-corsair, slave trader, notorious smuggler, freebooter, outlaw, black-market businessman, and lover of the ladies. He may have been a zealous patriot for the American cause in the final stages of the War of 1812, serving as a waterway guide and naval expert. Whatever he considered himself to be, Jean Laffite remains one of the most flamboyant, romantic, and mysterious characters to enter and then disappear from American history. For certain, Jean and his brother Pierre were real characters and their exploits intertwined with a fascinating era of New Orleans’ history as well as our country’s history.



- For two generations of moviegoers, the visual images of Jean Laffite fighting heroically alongside General Andrew Jackson at the Battle of New Orleans remains indelible. (A later generation's image of a pirate might be Jack Sparrow from the *Pirates of the Caribbean* films.) First, it was Fredric March in the 1938 film *The Buccaneer*. Then in 1958, Yul Brynner played Laffite in the movie remake starring Charlton Heston as Andrew Jackson and directed by Anthony Quinn. Surprisingly, the Yul Brynner epic is reasonably accurate in some parts but remains a stagy melodrama throughout. Some would say it comes off as hokey, and the romantic concoctions were inserted to pump up the box office receipts. It has its moments, yet, for historical purists, *The Buccaneer* should be scuttled. This film version has Laffite earringed and with chest medallion, in the heat of battle, risking his life to gauge battlefield distance for Jackson's weapons. Still, the film versions of the battle and Laffite's role gave Americans of that time (1938–1960) a certain portrayal of Laffite—a devil-may-care pirate/swashbuckler and American patriot. Was he really like that? Did he have a major role in the battle?
- Laffite's early years are shrouded in mystery, even where and when he was born (probably in France about 1780). By 1800, he was in the Caribbean region with his brother Pierre (nearly forgotten in books and film). It was during this time that Laffite became a pirate, using, as some suggest, a blacksmith shop in New Orleans as a cover-up for his illegal black market activities.
- To others, especially the ladies he charmed, Jean was handsome, charismatic, reasonably educated (he spoke several languages), and a clever rogue with a plethora of leadership skills, which he used to run a large and successful network of smuggling operations in swampy Barataria, an island empire that the brothers Laffite ran just fifty miles south of New Orleans. By 1810, their business was a flourishing enterprise with perhaps fifty ships, forty warehouses, and a very large band of loyal "employees." Laffite, of course, never called himself a pirate; he was a "privateer." Whatever he was, his vessels attacked mostly Spanish ships, stole the cargo, and then sold the goods on the New Orleans black market. For years, the U.S. government essentially left him alone since he never, according to Laffite himself, raided American ships.
- By the end of 1814, the United States realized that Laffite and his Baratarians could be a valuable military asset in the approaching battle against the British near New Orleans. Interestingly, the British had similar thoughts and offered Laffite thirty thousand dollars and a commission as captain in the British navy if he helped their cause against the Americans. Instead, Laffite refused the British offer, claimed he was an American patriot, and offered his services to General Jackson. He also told government officials of the British offer. Laffite, however,



had one condition: he, his brother, and the other Baratarians must be given pardons for all their illegal activities up to that time. Jackson believed the pirates were “hellish banditti;” but being a practical man, he accepted Laffite’s proposal. The general needed soldiers and the war materiel, especially flints, they would bring.

- So Jean and Pierre Laffite were now patriots, American allies, and were ready to be put on the fighting lines with Jackson’s army, to bravely repulse the British and to help secure an American victory.
  - Did this all really happen, like in the movies of the famous buccaneer? Did Laffite lead his Baratarians into battle and actually make a difference, tipping the scales to ensure victory?
3. Ask students, “From this backstory and in your opinion, before we look at the documents, was General Jackson’s decision—to accept pirates and outlaws as allies in an important battle—a wise military move? Should a general trust pirates, of all people, to fight in his army?” Pass out the **Points to Ponder Response Sheet** and have students write down their responses. Allow a few minutes, then discuss these responses.
  4. Say, “Now that we’ve discussed Jackson’s decision to accept the Laffites’ offer to fight for and bring supplies to the American army in exchange for a mass pardon, let’s move on to the **Focus Question**.”
  5. Pass out the package of **Documents A–E** and explain what students are to do.
  6. It is suggested that you show the last fifteen minutes or so of the 1958 film *The Buccaneer* to give students a perspective on how Laffite the pirate was perceived by an earlier generation of Americans.
  7. Before you allow forty-five minutes for students (in pairs or trios) to read and analyze the documents, perhaps you or a student should read aloud the first one or two documents and discuss the gist of each. Remind students to analyze the documents carefully before filling out the **Points to Ponder Response Sheet**.

Name \_\_\_\_\_ Date: \_\_\_\_\_

# Points to Ponder Response Sheet

**Focus Question:** Pirate/Patriot Jean Laffite: Did he and his Baratarians contribute significantly to the American victory at the Battle of New Orleans?

- 1. My thoughts about General Andrew Jackson’s decision to grant pardons to Laffite and his Baratarian pirates if they fought for the Americans at New Orleans:

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- 2. **Document A:** Most of “The Battle of New Orleans” song’s popularity (and sales) from 1959 to 1960 came from its instrumental beat, drums and banjo included. But the words reveal what listeners wanted to hear. Analyze the lyrics:

What kinds of strategies were used in the battle?

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What animals are mentioned and how are they used?

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What exaggerations seem to be the most outrageous?

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Is there any historical value to using modern pop songs to teach the past? Explain.

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- 3. **Document B:** According to Professor Hickey, why did Laffite join the Americans?

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Specify what Laffite did to aid the Americans.

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Why has Laffite remained a popular, almost charismatic, romantic figure?

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4. **Document C:** What makes it so difficult to evaluate the Laffite brothers' contributions to the battle?

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Specifically, what did the Laffites do as American allies?

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---

Where was Jean Laffite during the main battle on January 8, 1815?

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---

What can we conclude about Laffite and his Baratarians, according to William C. Davis?

---



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5. **Document D:** Fill in the chart based on excerpts 1–5.

Excerpt	Type of Document	Year Written	Primary or Secondary Source	The Laffites' Contribution
1				
2				
3				
4				
5				

6. **Document E**

What kind of document is it?

---

Who wrote it?

---



# Document A

## “The Battle of New Orleans”: A 1959 Pop Song (excerpt)

This sensational country and pop hit from 1959, written by school principal Jimmy Driftwood and performed by Johnny Horton, was the number-one record of the year. The record was released just months after *The Buccaneer* went into theaters, but the film had no connection to the song.

In 1814 we took a little trip  
Along with Colonel Jackson down the mighty Mississip'  
We took a little bacon and we took a little beans  
And we caught the bloody British in a town in New Orleans

We fired our guns and the British kept a-comin'  
There wasn't nigh as many as there was a while ago  
We fired once more and they begin to runnin'  
On down the Mississippi to the Gulf of Mexico  
(One-two-three, with a-one-two-three)

We looked down the river  
(Hut-two)  
And we see'd the British come  
(Three-four)  
And there must have been a hundred of 'em  
(Hut-two)  
Beatin' on the drums  
(Three-four)  
They stepped so high  
(Hut-two)  
And they made their bugles ring  
(Three-four)  
We stood beside our cotton bales  
(Hut-two)  
And didn't say a thing  
(Two-three-four)

We fired our guns and the British kept a-comin'  
There wasn't nigh as many as there was a while ago  
We fired once more and they begin to runnin'  
On down the Mississippi to the Gulf of Mexico

Old Hickory said we could take 'em by surprise  
(One-hut, two-three-four)  
If we didn't fire our muskets  
(One-hut, two-three-four)  
'Till we looked 'em in the eye  
(One-hut, two-three-four)

.....

Yeah, they ran through the briars  
(One-hup-two)  
And they ran through the brambles  
(Hup-two-three-four)  
And they ran through the bushes  
(Hup-two)  
Where a rabbit couldn't go  
(Hup-two-three-four)  
They ran so fast  
(Hup-two)  
That the hounds couldn't catch 'em  
(One-two-three-four)  
On down the Mississippi to the Gulf of Mexico  
(One-two, hup-two-three-four)

We fired our cannon 'til the barrel melted down  
So we grabbed an alligator and we fought another round  
We filled his head with cannon balls, and powdered his behind  
And when we touched the powder off the gator lost his mind

Source: "The Battle of New Orleans," by Jimmy Driftwood.

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# Document B

## A Scholar Punctures a Myth

Donald R. Hickey is a professor of history at Wayne State College in Nebraska and one of the leading scholars of the War of 1812.

*[Jean Laffite's] reasons for joining the American cause have often been misunderstood and his contribution to the American victory has been exaggerated. . . .*

*Why did Laffite prefer the United States over Great Britain? Although his decision has sometimes been portrayed as statesmanlike and patriotic, it probably reflected his disdain for the British (he was, after all, French) and, even more, a shrewd and pragmatic assessment of how best to serve his own interests. Betting that the Americans would win the battle or at least control the region after the war was over, Laffite realized that cooperating with the U.S. offered the best chance of escaping prosecution and recovering property that had been seized in the raid on his base.*

*Although Andrew Jackson considered the Baratarians "hellish banditti," influential locals persuaded him to accept Laffite's help. Laffite fully cooperated with the Americans, although he did not, as is often claimed, give Jackson a huge cache of artillery and shot. . . . Laffite did turn over 7,500 flints to Jackson, and he shared his intimate knowledge of the geography of the lower Delta, which was useful for gathering intelligence.*

*How important was the contribution of Jean Laffite and the Baratarians to the American victory at New Orleans? It was modest and probably not decisive. Jackson used the Laffite brothers as guides and messengers, and those Baratarians who volunteered for service were put to work on the warships in the river. They also manned two of the eight batteries in Jackson's line during the main battle and helped defend Fort St. Philip when it was later bombarded by the British. But no more than 100 Baratarians served, and they constituted only about 2 percent of Jackson's force. Although Pierre Laffite performed some useful staff duties for Jackson during the main battle, there is no evidence that his more famous brother was anywhere near the action that day or that he took part in, or contributed materially to, any of the other battles in the campaign.*

*Jean Laffite's contribution in the campaign has been exaggerated and that of his brother largely ignored. In his general orders recognizing those who had contributed to his victory, Jackson praised the Laffite brothers equally and did not mention any fighting they might have done. He simply said: "The brothers Laffite have exhibited the same courage and fidelity."*

*What accounts for Jean Laffite's inflated reputation? Laffite knew how to toot his own horn, and he was not above embellishment. His reputation also has benefited from a*

memoir attributed to him that greatly exaggerates the contribution of Laffite and the Baratarians to the victory at New Orleans. This work, which surfaced in the 1950s, is almost surely spurious\* and certainly inaccurate, and yet some historians have treated it as both authentic and reliable. Another reason for Laffite's reputation is the simple appeal of his story. The notion that a gentleman pirate and smuggler might have contributed to the spectacular American victory at New Orleans has been too much for filmmakers, novelists, and historians to resist.

Source: Donald R. Hickey, *Don't Give Up the Ship! Myths of the War of 1812* (Urbana: University of Illinois Press, 2006).

\*Spurious—lacking validity; false

# Document C

## The Laffites' and Baratarians' Contribution Is Assessed

Historian William C. Davis is the author of over forty books of history.

Men then and later debated the extent of the Laffites' contribution. The Baratarians, making up a scant 2 percent of Jackson's forces, were hardly a decisive factor. Most were stationed elsewhere at Fort St. John or Fort St. Philip, or on [Commodore] Patterson's *Louisiana*, and thus did not take part in the January 8 battle. The roles of Jean and Pierre themselves are so shadowy that it is scarcely possible to evaluate their impact, if any. Pierre's activities were peripheral, though certainly Jackson acknowledged his courage and usefulness. By contrast, no participant recalled with certainty that Jean was present during the battle, and a few testified later that they did not see him anywhere on the battlefield. Almost beyond question, Jean Laffite was not in the action on the east side of the river, and if he had been with [General David] Morgan on the other side, there would have been no need for Jackson to send Pierre. Most likely he was still with [Major Michael] Reynolds, or more likely still in the vicinity of Grand Isle [in Barataria Bay] where there were new affairs about to unfold of interest alike to General Jackson and the Laffites. As for the combined contribution of the brothers to the victory, their greatest influence must have been the moral force of their siding with the Americans, thus bringing French Louisianans over to that side. The seventy-five hundred flints they provided also cannot be discounted, though Jackson would exaggerate their importance. "If it had not been for this providential aid the country must have fallen," the general would say a dozen years later. In fact, in all likelihood, the battle would have been won without them, for it was British mistakes and bad fortune, combined with American artillery, that turned the tide. The Baratarians made an impact on the tide of battle, but no more than a host of other influences.

Source: William C. Davis, *The Pirates Laffite: The Treacherous World of the Corsairs of the Gulf* (Orlando: Harcourt, 2005).

# Document D

## The Brothers Laffite at New Orleans

Modern scholar Robert C. Vogel researched key correspondence and newspaper accounts about the Laffite brothers' contribution to the American victory at New Orleans. He published his findings in 2000.

### Excerpt 1

This advice supplied by Laffite was subsequently used by General Jackson to bolster one American position on the Chalmette battlefield before the fighting commenced.

*Lafite [sic] thinks our line to afford a Complete protection ought to be extended thro the first wood, to the Cypress swamp & the Canal Extended that Distance as they may otherwise turn our left. It being plain that the movement to the wood must be intended for one of these two purposes I have thought proper to give you this Information. Lafite says the wood may easily be marched thro all the Distance to the Cypress swamp which is nearly impracticable and affords as good a point of support on the left as the river on the right.*

Source: Letter from Edward Livingston to Andrew Jackson, December 25, 1814. *The Andrew Jackson Papers*, Library of Congress, Washington, D.C.

### Excerpt 2

*All the troops here have behaved admirably; [T]he Baratarians, who were relieved from prison on condition of service, have been of infinite use, they manned several guns which were most faithfully and skillfully served, and did great execution.*

Source: *Niles Weekly Register*, February 11, 1815 (Baltimore).

### Excerpt 3

*I informed you of Lafitte, the famous smuggler and pirate, having joined our forces. . . . They [the Baratarians] have been of great value, and distinguished themselves; as did the free people of colour. Indeed, it has proven a fortunate circumstance that they were enrolled in our army.*

Source: *Charleston Courier*, February 20, 1815.

## Excerpt 4

These words were part of a speech made by Jackson after the battle. The writer, Latour, was Jackson's chief engineer.

Captains Dominique and Belluche, lately commanding privateers at Baratavia, with part of their former crew and many brave citizens of New Orleans, were stationed at Nos. 3 and 4. The general cannot avoid giving his warm approbation of the manner in which these gentlemen have uniformly conducted themselves while under his command, and of the gallantry with which they have redeemed the pledge they gave at the opening of the campaign to defend the country. The brothers Lafitte have exhibited the same courage and fidelity; and the general promises that the government shall be duly apprized of their conduct.

Source: Arsène Lacarrière Latour, *Historical Memoir of the War in West Florida and Louisiana in 1814–1815* (Philadelphia: John Conrad, 1816).

## Excerpt 5

But it is probably not correct to say that the brothers Laffite and their associates were motivated to any great extent by patriotism for their adopted country. A more rational explanation would be that the Baratarians came to the aid of Jackson and [territorial governor William C. C.] Claiborne because they concluded it was to their advantage to do so. As underworld businessmen, the Laffites had compelling reasons for wanting to join the Americans in the defense of Louisiana, not the least of which were a desire for relief from prosecution in the federal courts, [and] restitution of property lost. . . .

While only a few dozen Baratarians saw action [Captains] You, Belluche, and their gun crews performed like veterans, distinguishing themselves during the critical engagements on January 1 and 8. Though not in the line of battle, Jean Laffite's record of loyal service was echoed by those of his brother Pierre and the other volunteers.

Source: All excerpts as quoted in Robert C. Vogel, "Jean Laffite, the Baratarians, and the Battle of New Orleans: A Reappraisal," *Louisiana History: The Journal of the Louisiana Historical Association* 41, no. 3 (Summer 2000) 261–276.

# Document E

## President Madison Grants a Pardon to the Baratarians

True to his word, and upon the recommendation of the Louisiana legislature, President James Madison granted clemency and forgiveness of any acts committed by the Baratarians prior to January 8, 1815.

### **Proclamation 19—Granting Pardon to Certain Inhabitants of Barrataria Who Acted in the Defense of New Orleans**

*February 6, 1815*

*By the President of the United States of America*

#### **A Proclamation**

It had been long ascertained that many foreigners, flying from the dangers of their own home, and that some citizens, forgetful of their duty, had cooperated in forming an establishment on the island of Barrataria, near the mouth of the river Mississippi, for the purposes of a clandestine and lawless trade.

. . . [T]hey have abandoned the prosecution of the worse cause for the support of the best, and . . . they have exhibited in the defense of New Orleans unequivocal traits of courage and fidelity. Offenders who have refused to become the associates of the enemy in the war upon the most seducing terms of invitation and who have aided to repel his hostile invasion of the territory of the United States can no longer be considered as objects of punishment, but as objects of a generous forgiveness.

It has therefore been seen with great satisfaction that the general assembly of the State of Louisiana earnestly recommend those offenders to the benefit of a full pardon.

And in compliance with that recommendation . . . I, James Madison, President of the United States of America, do issue this proclamation, hereby granting, publishing, and declaring a free and full pardon of all offenses committed in violation of any act or acts of the Congress of the said United States touching the revenue, trade, and navigation thereof or touching the intercourse and commerce of the United States with foreign nations at any time before the 8th day of January, in the present year 1815 . . . *Provided*, That every person claiming the benefit of this full pardon in order to entitle himself thereto shall produce a certificate in writing from the governor of the State of Louisiana stating that such person has aided in the defense of New Orleans and the adjacent country during the invasion thereof as aforesaid.

And I do hereby further authorize and direct all suits, indictments, and prosecutions for fines, penalties, and forfeitures against any person or persons who shall be entitled to the benefit of this full pardon forthwith to be stayed, discontinued, and released.

*Done at the city of Washington, the 6th day of February, in the year 1815.*

JAMES MADISON

*By the President:*

JAMES MONROE,

*Acting as Secretary of State*

Footnote: None of the Baratarians came forward to obtain certification of their military service as required by Madison. They simply went free.

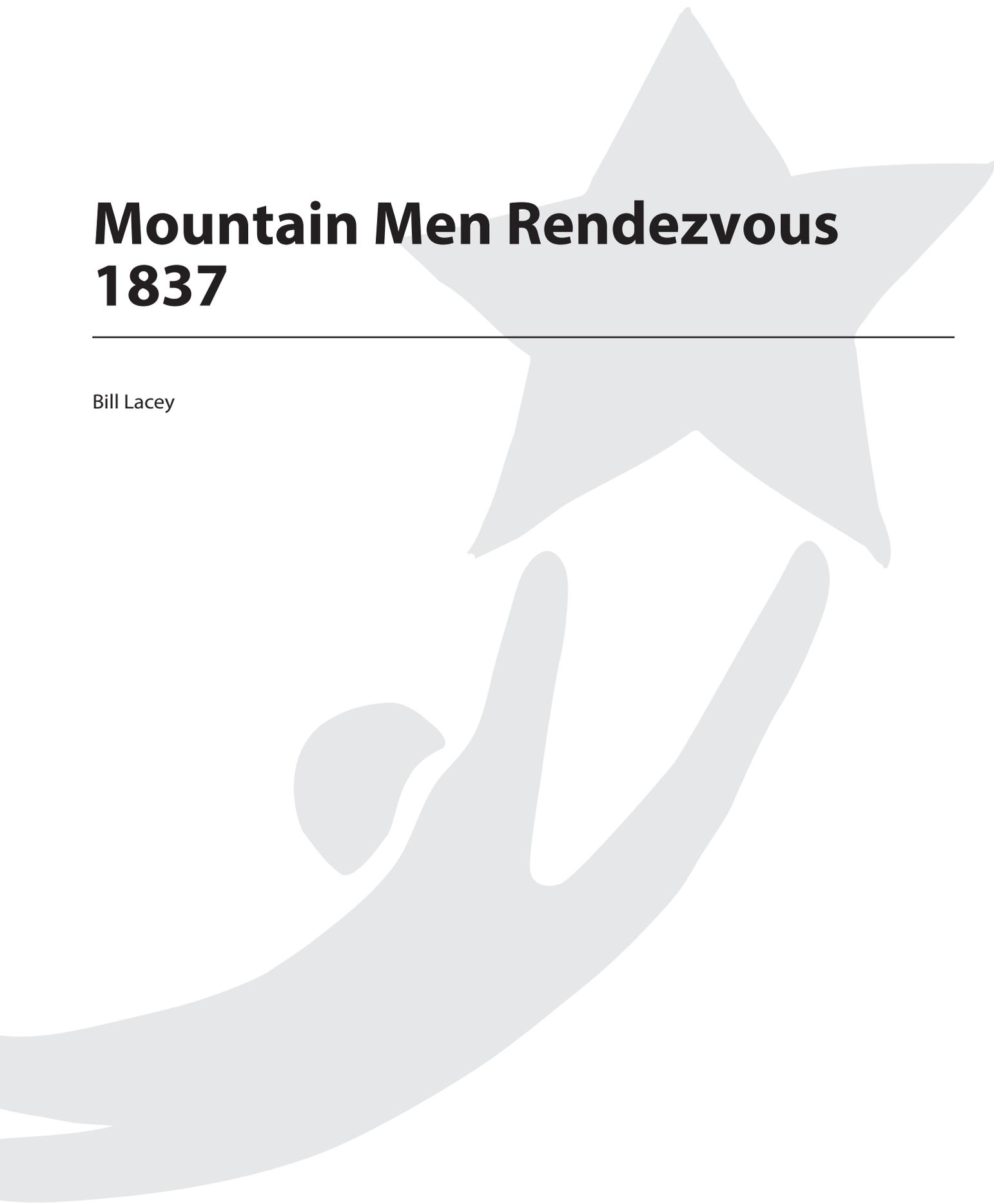
Source: James Madison: "Proclamation 19—Granting Pardon to Certain Inhabitants of Barrataria Who Acted in the Defense of New Orleans," February 6, 1815, *The American Presidency Project*, <http://www.presidency.ucsb.edu/ws/?pid=65982>.



# Mountain Men Rendezvous 1837

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Bill Lacey



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## Lesson Plan

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### Overview

This Activator will involve your students in the life of mountain men, those intrepid beaver trappers who explored the unknown Far West in search of “hairy bank notes.” As they re-create hair-raisin’ experiences of this reckless breed, they will learn about our nation’s greatest trailblazers and scouts who mapped the West while they hunted for beaver. Get ready to spin yarns and to outrun Blackfeet Indians.

### Setup

#### 1. Duplication

- **Background Essay**—*class set*
- **Postscript**—*class set*
- **Parent Permission Slip**—*class set* (if you think this form is necessary to alert parents to the rigorous nature of the wilderness gauntlet activity)
- **Mountain Man Awards**—enough copies to distribute to winners of the gauntlet and yarn-spinning activities.
- **Yarning**—*class set*
- **Yarn Cards**—*5–6 copies* of the sheet to be cut and distributed to each yarning campfire group (each campfire group receives one of the nine yarn-starters)
- **How Mountain Men Talked**—*class set*
- *(Optional)* **Wagh Award**—*one copy* if you and your class plan to honor one student as “the most enthusiastic and effective mountain man in class”

2. **Schematics, props, costumes:** Study the **Schematics** carefully. Find and bring into your classroom any props or costume pieces that will help create the setting and some reality of the Rocky Mountains in 1837. Perhaps students could help by bringing enough flashlights for the eight or nine trapping party campfires and any hats, moccasins, or clothing items mountain men might have worn. Some students also need time to make the signs, to bring in one or two blankets and a few stopwatches, and, if possible, to find a pair of snowshoes for the initial activity—the wilderness gauntlet.

3. **Roles:** In this Activator you will need to group your students into trapping parties of four. Each trapping party will be a unit through the two activities described below.
  - **Activity 1:** Each party of four selects one member of the group to be “John Colter,” who will run through a gauntlet of obstacles simulating a “race for his life.” Colter experienced this horror after he was captured by the Blackfeet Indians. Each runner will be timed, and winners will be awarded a Fastest Runner award.
  - **Activity 2:** Once back at camp, trapping parties use Yarn Cards, given a day or two earlier, to advance and embellish a tall tale typical of mountain men whiling away the hours before they retire for the night. Students sit around a flashlight to simulate a campfire.
4. **Narrator(s):** Unlike many other Activators in this series, this Activator involves no narrators and no prepared script to follow.

## Directions

1. Preparations
  - a. Make sure you have duplicated all handouts enumerated above.
  - b. Make sure you, or a few students, have made the necessary signs for the obstacle/gauntlet course.
  - c. Make sure parent permission slips—especially from students who will run the gauntlet—are returned to you. While not a medical release, it should protect you from (and alert parents to) any problems down the line regarding sick or injured students.
  - d. Make sure all students have been given copies of the **Yarn Cards** and **How Mountain Men Talked** handouts at least one day prior to the yarn-spinning activity.
  - e. Make sure you allow enough time for students to adequately lay out the gauntlet course.
2. Either hand out the **Background Essay** as homework the day before class or pass it out now. If you have given it as homework, conduct an informal discussion of the essay’s main points. If you are passing it out now, read the essay aloud to students as they read with you, pausing to explain the main points. (This choice, of course, is determined by your students’ age and reading level.)
3. Briefly display each of the two **Schematics**, explain how the two phases work, assign any roles, and then have students rearrange the classroom to resemble the campfires they will sit at after returning from the



### Teaching tip

**Note:** Assign your best students to be Brigade Leaders.



### Teaching tip

Use the **Wilderness Gauntlet Model** to

inspire your sign makers to do a good job. **Note:** These are only models. Have students use the words, but tell them to design the actual signs in a way that they think is appropriate.

gauntlet activity. While the desks are being moved to the perimeters of the classroom to give maximum room to the yarn-spinning campfire activity, send some students outside to set up for the wilderness gauntlet, including the various signs, props, etc., to simulate the trapper's "ordeal."

You have a few different ways you can conduct the actual Activator:

## Option A

1. Decide if you want to do both phases of this Activator. The wilderness gauntlet will require some extra energy from you, but channeling the more active learning styles of today's students will pay dividends with high-level student interest. This phase has been successfully piloted, and many students over the years recall the gauntlet as a highlight of the year.
2. If this option is selected, both phases will take place. In this case, follow the suggestions below:
  - a. Student runners, one each from the eight to nine trapping parties, are selected.
  - b. Read the brief story that follows, enlightening all students about the wilderness gauntlet similarly faced by mountain man John Colter.

"John Colter, a trapper extraordinaire, is considered to be the first mountain man. He achieved legendary status in the Rockies, but his life was cut short by jaundice in 1813. Most of his fame as a courageous 'Long Knife' rests on one incident, which typifies the dangers faced by his breed of frontiersman. On one trapping expedition, Colter and his partner John Potts were captured by the hostile Blackfeet Indians. Potts was then riddled with arrows, but Colter was temporarily spared to serve as part of a devious sport. He was stripped naked and told to run for his life. Barefooted and given a head start of no more than forty yards, Colter began a foot race pursued by Blackfeet, an incident which became embellished in mountain man yarn and lore as one of the frontier's most heroic episodes."

Your student runners will now face a challenging wilderness gauntlet, fraught with simulated dangers Colter himself might have considered difficult. His route covered miles of rough terrain—cacti and thorns eventually making his feet bloody stumps—as swift Blackfeet braves pursued him with spears. Your obstacle course, though obviously not an exact mirror of Colter's ordeal, will nevertheless test your hardy trappers.

### Teaching tip

Read or tell John Colter's story slowly and dramatically so that students appreciate his incredible adventure.



**Option B**

1. If you have a less active, more verbal group of students, plan and carry out only the yarn-spinning phase. This option would be operative, too, if bad weather is a factor.

**Option C**

1. This choice involves a shorter version of each phase. In the wilderness gauntlet, select three to four students to run the course, without regard to trapping party allegiance or representation.
2. Option C allows for a briefer version of the yarn spinning too. Instead of having all eight or nine groups spin different yarn card stories, merely select one or two groups (eight students) to embellish a few tales. Of course, preparation with the **Yarn Cards** and **How Mountain Men Talked** a day or two prior is still essential.

**Gauntlet activity**

1. A few days before, find some fourteen or more pieces of one- by two-foot white posterboard. Have students re-create the signs in the **Wilderness Gauntlet Model**. Once done, use a staple gun to attach each sign to a redwood/cedar furring strip. (**Option:** Have students hold up the signs along the race course.)
2. Find a nice large open space/field and visually chart the race course. (Eventually, you should mark off the course with signs and lime/wooden stakes.) Make appropriate contacts with school personnel to reserve the area for the event.
3. Use a stopwatch to time each runner on race day. Also find a blanket or two for use at station #6. Buy two or three large cans of tomato/V8 juice to simulate the "buffalo blood" at station #14. For snowshoes at station #12, runners can merely pretend they are on snowshoes.
4. Before students go out to the course, decide whether or not to tell them what specific actions need to occur. The author's pilot-testing experience favors informing them of the tasks beforehand.
5. Let students assemble in trapping party quartets and select their "John Colter" to represent them. (If eight groups select one runner, you will have eight separate races, one at a time.)
6. Allow one class period to run the races, maybe extending the Activator one day, before coming inside the classroom for yarn spinning.

**Teaching tip**

Advanced preparation is really necessary for this activity.

**Teaching tip**

Over the years, the author and his team teaching colleague John Bovberg have staged this activity many times with great student success. They love it!

## Mountain Men Rendezvous: 1837

### Lesson Plan

#### Teaching tip

Decide in advance whether or not a "chug-a-lug" contest would be appropriate in your school setting.



#### Teaching tip

Set up a small table near the finish line for the "chug-a-lug" contest and hand games.



#### Teaching tip

Test beforehand how much light is given off by the colored flashlights. Adjust to your liking and keep the area dark enough so students cannot read any notes. A dim room may lessen anxiety.



### Post-gauntlet break

1. To divide the wilderness gauntlet activity from the more sedate yarn-spinning campfires, you might want to consider allowing students to have a chug-a-lug contest with water or punch to simulate the drinking contests actually held at the annual rendezvous.
2. Other students, not up to quaffing down quarts of "firewater," might try their skill at a few games of hand: three half walnut shells, one with a hidden marble underneath. Throughout the frontier period, many trappers lost a year's profit playing this immensely popular sleight-of-hand game.

### Yarn spinning

3. If you haven't already handed out the **Yarning, Yarn Cards**, and **How Mountain Men Talked** sheets, do it now. It is recommended that you distribute these pages a day or two before to facilitate this Activator phase and to enhance the quality of the yarns spun in each campfire. For those students who seem to lack the confidence to fabricate impromptu stories, a day or two to prepare possible scenarios, events, characters, and mountain man lingo would help create a more level playing field.
4. Review the contents of these handouts. Make sure students know what this phase's purpose is: to take a mountain man story and advance the tale one by one into a yarn, an exaggerated piece with a beginning, a middle, and an end. Also remind them that they are to keep the "chain story" going for three to five minutes or more.
5. Set an timer for three to five minutes; then check to see if each party has a different **Yarn Card**. Have them turn their flashlights on (one in the middle of four trappers with a paper covering the light to diffuse it). Turn off the classroom lights and tell them to start. Walk from "fire" to "fire" to help as they are spinning their yarns.
6. After the allotted time, you could ask each group to select the best yarn spinner to compete in a final round of competition with all eight or nine winners. Put these winners around two flashlights, arbitrarily hand out a **Yarn Card**, and let them create another tall tale within five minutes. Let the entire class vote for the best yarn spinner in the class. Give a **Mountain Man Award** to the winner.

### Debriefing

Decide whether you wish to use a short or long debriefing. Here are possible ways to make meaningful what happened during this Activator on the life of a Rocky Mountain trapper:

### Short Debriefing

1. Pass out the **Postscript**. Either read this to your students or summarize each paragraph's main points before going on.
2. Ask students to discuss what they learned and what they felt as they played their roles as beaver trappers, yarn spinners, and "animals" stalked by Blackfoot Indians.
3. Consider having students write a Learning Log entry following the short debriefing.

### Long Debriefing

Use one or more of the following debriefing activities:

1. Pass out the **Postscript**. Either read this to your students or summarize each paragraph's main points before going on.
2. Ask students if the positive legacies of the mountain men—blazing and mapping trails; charting rivers and mountain ranges; serving as scouts, interpreters, and guides for later pioneers; and being heroic examples of self-reliance and survivalists—outweigh their exploitation of both human and animal life with their selfish and cruel lifestyles and their lives of unparalleled savagery and low regard for most human life.
3. Ask students to express their opinions about today's fur "trappers," those who raise and kill animals to supply skins for fur coats and stoles. Should fur coats be banned? Is trapping and fur farming now a cruel and unnecessary occupation?
4. Display images from Bil Gilbert's *The Trailblazers* (Time-Life Books, 1973), especially pages 46–47, 78–79, 80–89. The last pages listed are photographs of mountain men in their later years. Ask students if these men fit the portrayal of mountain men in this Activator.
5. Have students come up with a simile or metaphor: "Mountain men were like . . ." or "Mountain men were . . ."
6. Show a feature film on the mountain men. Recommended: *Jeremiah Johnson*, starring Robert Redford. Afterward, ask students to reflect on "living on the edge," the violence and dangers of existing on the frontier, and what they saw in the film that mirrored what they learned during this Activator. (Hints: The character traps beaver; his friend Del Gue spins a tall tale; the environment turns Jeremiah into a "savage.")
7. Since the 1970s, some American males have sought to imitate nineteenth-century fur trappers by going to a rendezvous for a couple

of weeks in the summer. There, they strut in pre-1840 mountain men regalia, buy and sell equipment or costume pieces, yarn spin at a midnight campfire, and toss “hawks” and fire black powder Hawks. What kind of contemporary man would want to undertake such a trip?

8. Have students write a cinquain on mountain men using the established pattern found in the example below.

**Cinquain** (*sing-kane*)

Pattern	Example
<b>First line</b> One word giving the title	Trappers
<b>Second line</b> Two words that describe the title	Bold, adventurous
<b>Third line</b> Three words that express action	Exploring, trapping, yarning
<b>Fourth line</b> Four words that express feelings about the subject	Independent, invigorating, exciting, Wagh!
<b>Fifth line</b> One word—a synonym for the title	Trailblazers

9. If you feel it is appropriate because your students were so involved in this activity, consider having students vote on giving an outstanding mountain man award—**The Wagh Award**—to one student. You and your students might toast the winner with cans of tomato/V8 juice raised high followed by some heroic **“Waghs!”** shouted loudly enough to rattle the classroom windows.
10. Consider having students write a Learning Log entry following the various activities in this debriefing.

Write a Learning Log ...

Learning Log	
●	I really like camping out with my family so when Mrs. Wade got us into this mountain man Activator, I was interested right away. After we sat in yarn spinning groups and wrote those stories, I really started laughing. Our story was a real stretcher. I went home and told my Dad, who is a Scout Master in our church. He was so fascinated by all the stuff I had done and learned that he says he's going to contact the school and find out about doing this Activator with his troop when they go out on their next camp-out. I'll also remember the gauntlet activity when Ann Lancaster ran like the wind and beat everyone ...
●	



**Teaching tip**

Having students write their reactions to what happened to them during their experience will result in their remembering what they have been learning.

**Note:** If your students became quite competent in using mountain men language, encourage them to use it while writing their Learning Logs.

**Resources to consult**

Barbour, Barton H. *Jedediah Smith: No Ordinary Mountain Man*. Norman: University of Oklahoma Press, 2009.

Billington, Ray. *The Far Western Frontier, 1830–1860*. New York: Harper and Row, 1962 (specifically, chapter 3).

Blevins, Winfred. *Give Your Heart to the Hawks: A Tribute to the Mountain Men*. Los Angeles: Nash, 1973.

Brandon, William. "The Wild Freedom of The Mountain Men," *American Heritage* 6, no. 5 (August 1955) 4–9.

Cleland, Robert G. *This Reckless Breed of Men: The Trappers and Fur Traders of the Southwest*. New York: Alfred A. Knopf, 1963.

Dolin, Eric Jay. *Fur, Fortune, and Empire: The Epic History of the Fur Trade in America*. New York: W. W. Norton, 2010.

Gilbert, Bil. *The Trailblazers*. The Old West series. New York: Time-Life, 1973 (especially the first three chapters).

———. *Westering Man: The Life of Joseph Walker*. Norman: University of Oklahoma Press, 1983.

## Mountain Men Rendezvous: 1837

### Lesson Plan

Hafen, LeRoy, ed. *Mountain Men & Fur Traders of the Far West: Eighteen Biographical Sketches*. Lincoln: University of Nebraska Press, 1982.

Jones, Evan. *Trappers and Mountain Men*. New York: Golden Press, 1961.

Laycock, George. *The Mountain Men: The Dramatic History and Lore of the First Frontiersmen*. Guilford, CT: The Globe Pequot Press, 1996.

Utley, Robert M. *A Life, Wild and Perilous: Mountain Men and the Paths to the Pacific*. New York: Henry Holt, 1997.

### Visual history

**Documentaries:** One of the best documentaries on the subject is an episode of the series *The Real West* entitled "Trailblazers and Scouts," narrated by Kenny Rogers. The first thirty minutes nicely parallel the **Background Essay**.

**Feature films:** *Jeremiah Johnson* (1972) with Robert Redford in the title role. *Man in the Wilderness* (1971) stars Richard Harris as Zach Bass and is based on the real-life story of frontiersman Hugh Glass. A more recent telling of the Hugh Glass story is *The Revenant* (2015), starring Leonardo DiCaprio. *The Mountain Men* (1980) is an R-rated movie with Charlton Heston and Brian Keith. The first two episodes of the miniseries *Centennial* (1978) with Richard Chamberlain and Robert Conrad are superb.

# Background Essay

**Place:** The Rocky Mountains

**Time:** June 1837

## **Role in U.S. history**

The era of the mountain men was notably brief, perhaps only about twenty years of the nineteenth century (1820–1840). Yet, after they left the region we call the Far West or settled into more comfortable and less risky professions, the rest of America had a blueprint of the vast territory between the Mississippi River and the Pacific Coast. Passes, fertile valleys, rivers, and streams had been identified, and Native Americans had been exposed to the Anglo-Americans' products, culture, and diseases. As historian Richard White writes, mountain men "entered the West as harbingers of an American imperialism that would deliver the West to the United States."

## **Deeds and yarning**

Eastern tenderfoots ("pork eaters" to the buffalo-loving mountain men) lapped up the heroics of the mountain men, and, as they got excited about these deeds, easterners also considered the West as a place to explore and settle. In no small way, the beaver hunters promoted Western expansion in the years before, during, and after the War with Mexico (1846–1848). Very often the deeds described in trapper diaries and stories were "yarns" or tall tales: exaggerations of events experienced. Nevertheless, the West's beauty and dangers gave the potential for an incredible number of real-life achievements and *ha'r-raisin'* episodes.

## **Living on the edge**

Faced with daily encounters with both spectacular scenery and near-death adventures, the mountain men lived on the edge, where luck or skill often determined survival or death. Grizzlies, snakes, hostile Native Americans, bad whiskey, and the ever-present elements of nature made it seem

like trappers had a constant gauntlet to run just to stay alive. Most, however, survived and gloried in the name "mountain men."

## **Legends**

Perhaps a notable few of this hardy breed should be singled out. The acknowledged first of our "Fur Fathers" was John Colter of the Lewis and Clark expedition. He left this famous exploration party to stay in the Rockies and explore Yellowstone's wonders. Colter also had a heart-thumping escape from the feared Blackfoot Native Americans worthy of a gifted novelist's imagination. Thomas "Broken Hand" Fitzpatrick's hair reportedly turned white almost overnight after hiding out from Native Americans in a snake pit. The legendary Hugh Glass was mauled and nearly "rubbed out" by a *she-rip* (female grizzly). After being abandoned by two of his *companyeros* as a "doomed beaver," Glass, burning with revenge, survived several weeks of painful crawling and limping to make those who witnessed his resurrection at Fort Kiowa claim he was indestructible. A run-in with the Blackfeet years later proved he wasn't.

## **Smith, Walker, and Carson**

Like Glass, it was a rare mountain man who didn't eventually perish or at least get his *ha'r* parted in an encounter with a bear. It went with the territory. One trapper counted two hundred grizzly in a day. Jedediah Strong Smith was a mountain man who survived a tussle with a *she-rip*, but he did get his *ha'r* parted (along with some flesh) as a badge of courage for the rest of his short but productive career as an explorer. This was fortunate for future generations, as Smith was able to lead two expeditions to Mexican California, Oregon, and across the rugged Sierra Nevada mountains west-to-east.

Before a lonely death in 1831 ended his illustrious life, "Old Diah" racked up a slew of firsts among his breed. Joseph R. Walker was much in the same mold as Smith. Walker's exploits included seeing Yosemite Valley's unspoiled beauties before other Anglos did.

Perhaps the quintessential mountain man-explorer was Kit Carson. His brief fur-trapping career was capstoned by his travels all around the region as a scout for the U.S. army. His exploits resulted in his being called "the Marco Polo of the West." Later on, after playing a vital role in the Civil War, Carson became a Native American agent in the Southwest. Hundreds more, in the mold of Smith or Carson, could be included in a who's who of famous pioneers.

### **Lifestyle**

The manner in which most trappers lived, dictated by their primitive surroundings, was perhaps one stage above that of the animals they avoided or stalked. They dressed in buckskins, drank buffalo blood or even their own urine on occasion, and ate animal intestines and ants. A few resorted to cannibalism in order to survive. Ever-present frontier dangers turned many trappers into savages who had a callous regard for life, even their own.

### **Fur trade**

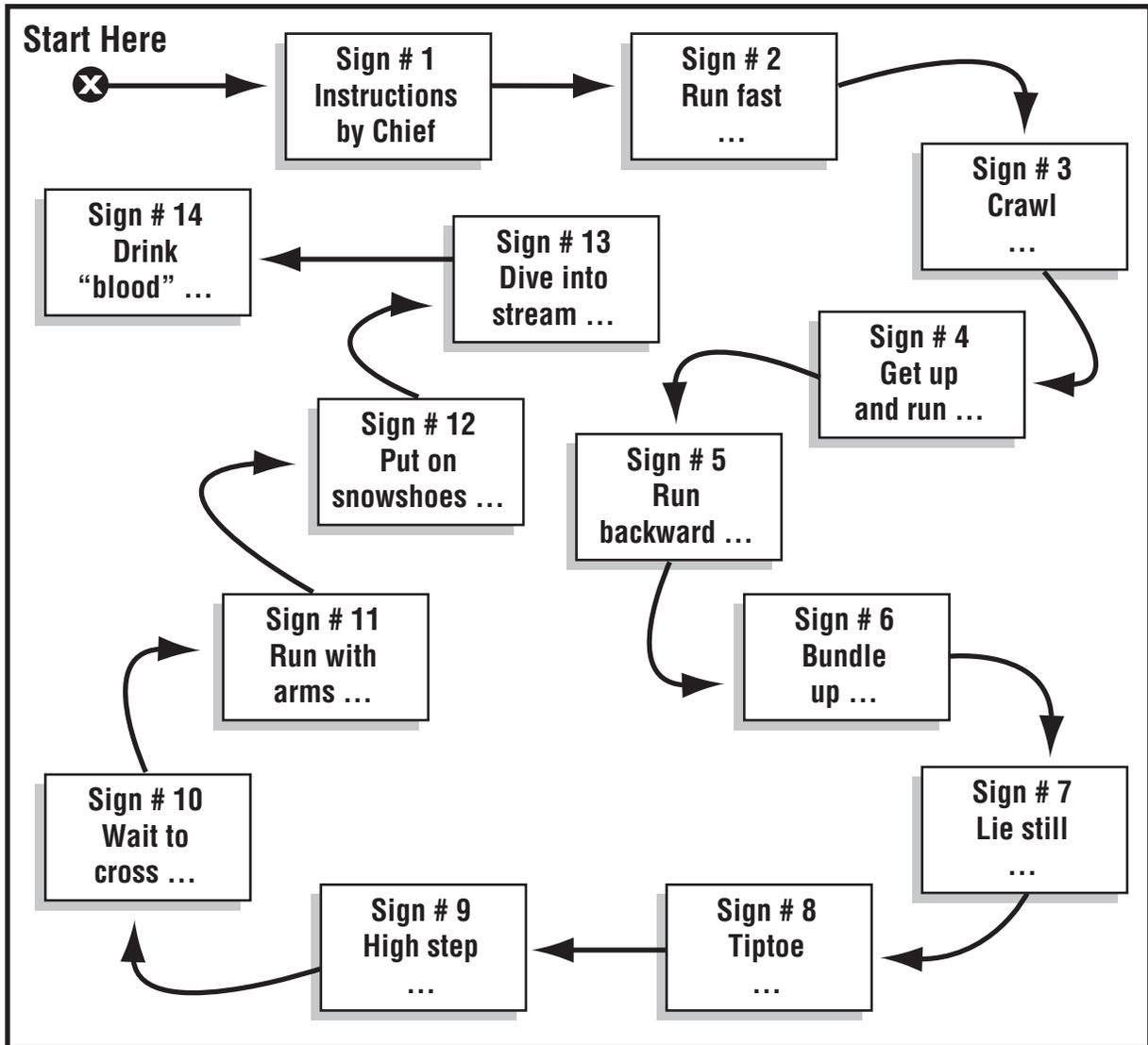
What helped the mountain men in the Rockies and Far West survive year after year as they lived their almost lethal lifestyle while they blazed trails all over the West? It was their quest for beaver fur. Fashion had dictated that men in clothes-conscious cities in Europe and America would wear hats or caps made from the nappy epidermis of one of nature's most industrious mammals. Beavers made their homes in streams and ponds throughout the West. Their existence, and the whims of fashion, gave mountain men a reason to explore and live out a primitive existence in the nooks and crannies beyond the frontier.

### **Go to rony, run the gauntlet, spin a yarn**

Now you and your classmates will test your frontier mettle and sharpen your survival and storytelling skills. Going to an annual rendezvous afforded the mountain men a chance to let off steam, perform acts of foolhardy bravery, and tell outrageous yarns about their lives in the rugged environment of the western mountains. So be ready to slip into some buckskins and become part of history's reckless breed. "**Wagh!**"

# Schematics

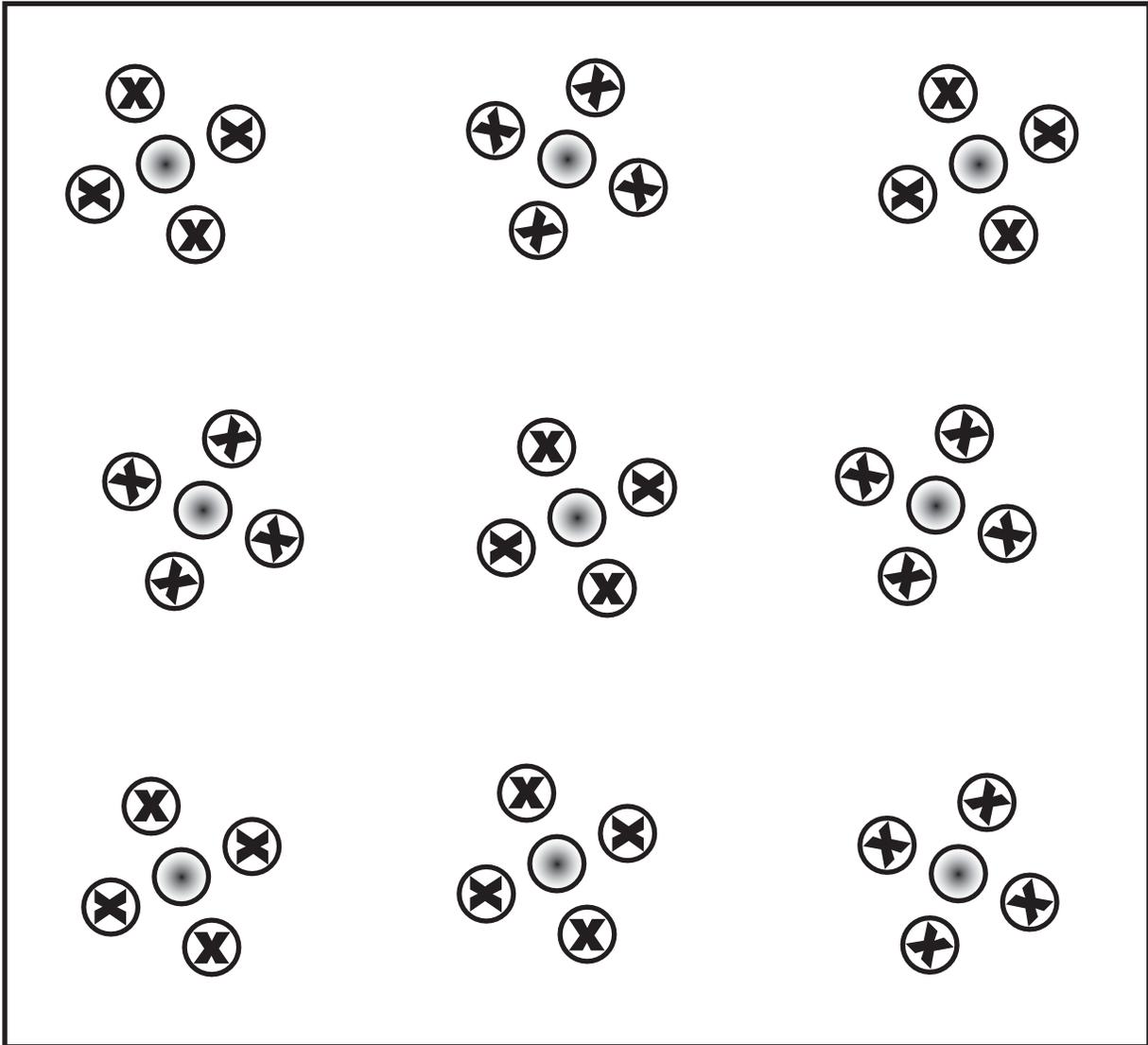
## Wilderness Gauntlet



### Suggestions

- Design your own race course according to your needs and the outside area you've chosen.
- For details and exact sign labels see the **Wilderness Gauntlet Model** page.
- Try not to allow the runners to see the entire course layout, especially the last few signs.
- Use student sign-holders instead of signs and stakes in the ground.
- Have two timers for each of the eight or nine runners.
- Have runners run the gauntlet one at a time.
- Play "chug-a-lug" and hand games after the races.

Schematic: Spinning



Suggestions

- Try to make each group a party of four.
- Give essential handouts a day or two in advance.
- Limit chain yarns to five minutes.
- Use only enough light to enable trappers to barely see.
- Have each party's yarning winner compete against one another in the winner's round.



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# Parent Permission Form

## Mountain Men Rendezvous (Parent Permission Form)

Trapper's Name \_\_\_\_\_ Teacher \_\_\_\_\_

I, \_\_\_\_\_, hereby give permission for my child, \_\_\_\_\_, to participate in:

- Yarn-Spinning at a Classroom "Campfire"
- The Possibly Exhausting Wilderness Gauntlet Run

\_\_\_\_\_, 1837 \_\_\_\_\_  
Date Parent Signature

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Date Parent Signature

# Company Personnel

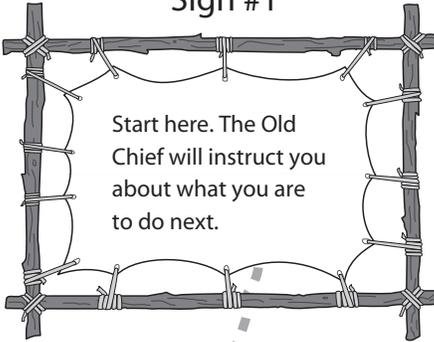
## Rocky Mountain Fur Company

<b>"Cannibals"</b>	Brigade Leader • _____ • _____ • _____ • _____	Brigade Leader • _____ • _____ • _____ • _____	<b>"Mountaineers"</b>
<b>"Grizzlies"</b>	Brigade Leader • _____ • _____ • _____ • _____	Brigade Leader • _____ • _____ • _____ • _____	<b>"Green River Boys"</b>
<b>"Free Trappers"</b>	Brigade Leader • _____ • _____ • _____ • _____	Brigade Leader • _____ • _____ • _____ • _____	<b>"She-Rips"</b>
<b>"Rockies"</b>	Brigade Leader • _____ • _____ • _____ • _____	Brigade Leader • _____ • _____ • _____ • _____	<b>"Varmints"</b>
<b>"Beavers"</b>	Brigade Leader • _____ • _____ • _____ • _____		

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# Wilderness Gauntlet Model

**Sign #1**



Start here. The Old Chief will instruct you about what you are to do next.

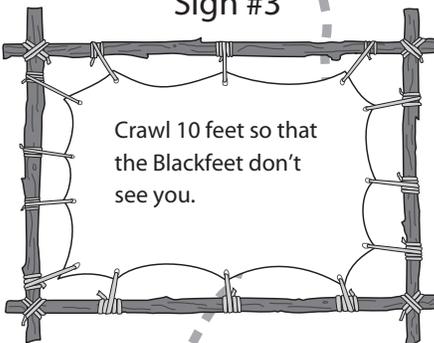
Walk until you see...

**Sign #2**



Run fast until you see the next sign.

**Sign #3**



Crawl 10 feet so that the Blackfeet don't see you.

**Sign #4**



Get up when you reach this sign, run 10 yards, then run for your life.

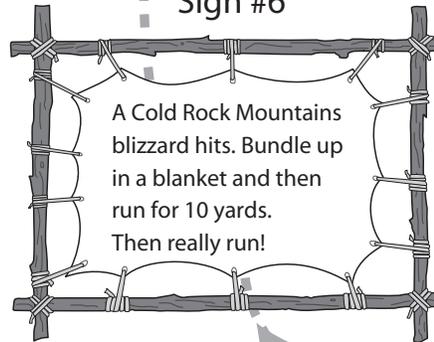
Signs #8-#14 are on a second sheet...

**Sign #7**



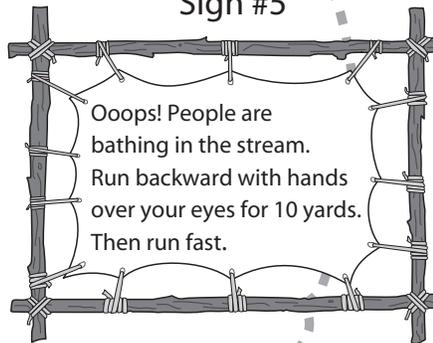
Blackfeet hunting party nearby. Lie still for 20 seconds. Then run!

**Sign #6**



A Cold Rock Mountains blizzard hits. Bundle up in a blanket and then run for 10 yards. Then really run!

**Sign #5**



Ooops! People are bathing in the stream. Run backward with hands over your eyes for 10 yards. Then run fast.

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- Signs #1–#7 are on the first sheet.
- Signs #8–#14 continue on the second sheet.

**Sign #8**

Grizzlies are in the area.  
Tiptoe for 10 yards.  
Then run fast!

**Sign #9**

You are in a swampy area.  
High-step it for 20 yards.  
Then run.

**Sign #10**

Flood waters have risen on the Jefferson River.  
Wait 20 seconds to cross.  
Then run fast.

**Sign #14**

You have escaped from the Blackfeet. Welcome to Ft. Lisa. Drink some "buffalo blood."

**Sign #13**

Keeping running for your life. Dive into a stream to hide under logs. "Swim" for 10 yards. Then run!

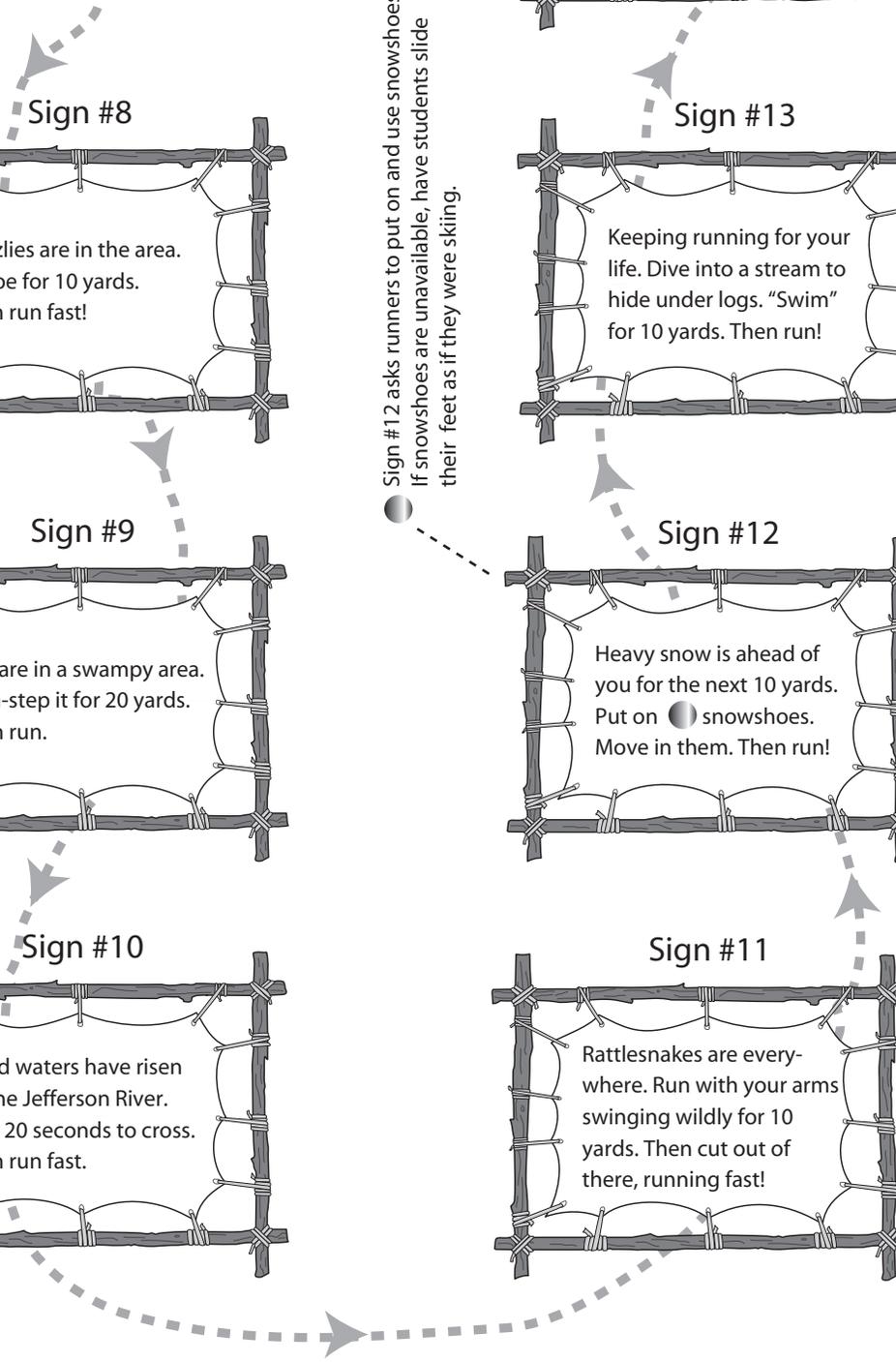
**Sign #12**

Heavy snow is ahead of you for the next 10 yards.  
Put on snowshoes.  
Move in them. Then run!

**Sign #11**

Rattlesnakes are everywhere. Run with your arms swinging wildly for 10 yards. Then cut out of there, running fast!

● Sign #12 asks runners to put on and use snowshoes. If snowshoes are unavailable, have students slide their feet as if they were skiing.



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# Yarning

## The “yarn”

Before television, before radio, before any electronic communication, there was the “yarn:” the tall tale told to pass the evening hours humans had after work and prior to sleep. Many frontier people of the pre-electronic nineteenth century became, out of necessity, skilled storytellers, or yarn spinners. Mountain men, especially, seemed to have a knack for embellishing the lives they led in their wilderness environment. Based on kernels of reality, most yarns spun by Rocky Mountain trappers were often shared experiences. Huddled in winter lodges and tepees or at the summer rendezvous, drawing on pipes, and taking frequent swallows of whiskey, mountain men bragged, exaggerated, embellished, and added color to real events. Some just fabricated entire stories that might have happened only to them. Much like today’s polished stand-up comedians and after-dinner speakers, yarn spinners were prized attractions, and it was a rare mountain man who failed to use his vivid imagination when he had the opportunity. Now, it’s time for you to try your skill at a mountain man tradition. Your trapping party will draw a card with a brief story on it. Each member of the party will, in turn, add to the original story until the tall tale is brought to a fitting conclusion.

## Suggestions for a memorable yarn:

- Stay close in topic to the story’s original beginning.
- Use colorful metaphors and similes to heighten interest and simulate mountain man authenticity. Here are two similes: “That she-rip was as tall as a St. Louis store,” “The beaver I took in ‘28 on Seeds-kee-dee was as big as my pappy’s dog.”
- Use the mountain man’s colorful lexicon found on the **How Mountain Men Talked** handout. Using some of these words and phrases will lend authenticity to your segments of the yarn and will elevate your trapping party’s yarn to higher standards of accuracy.
- While the others in your party are yarn-spinning, be an active listener by nodding, using positive facial expressions, and by adding a brief comment or two.
- If your teacher gives you the yarning handouts a day or two before your party sits down to spin its yarn, use the information and suggestions to practice what you might say as you embellish details in your yarn. Practice saying words and phrases mountain men in the 1830s might have used while they squatted around a warming blaze on a cold, dark night in the Rockies.
- In any case, give your yarn’s characters amazing powers, create vivid scenes, and have the crisis or problem solved during the final trapper’s segment. Most importantly, make your yarn move along smoothly and rapidly so that you hold your listeners’ attention.
- Have fun with your story told in the language of the mountain men.



### Acting tip

Stand up when you tell your yarn. Pause before you begin and capture everyone’s eyes with yours. Then use dramatic body language to make your story come alive. For example, if you were telling a story of when you killed or ran from a male grizzly bear (see the name “Old Ephraim” on **How Mountain Men Talked**), you would rapidly move your arms and hands to suggest the size of this giant grizzly who was chasing you. (Of course, in your story he would become larger than he was in real life.)

# How Mountain Men Talked

Typical of human beings isolated from others, mountain men developed a unique way of communicating. Far out on the frontier and beyond, mountain men used a colorful and vivid vocabulary to express their thoughts. The best way to get into their minds and enrich your yarnin' is for you to use as many of these expressions as you can.

- **Cache:** to hide or conceal
- **Can't shine in this crowd:** not important
- **Companyeros:** friends, fellow mountain men
- **Count coup:** kill or scalp
- **Doomed beaver:** someone for whom death is imminent
- **Feed fair:** shout of enjoyment while eating
- **Fofarrow:** decoration, anything unnecessary or showy (usually on their wives)
- **Get quite a glow:** ecstasy after eating buffalo meat, drinking Taos lightning (whiskey), or smoking 'bacca (tobacco)
- **Go under:** die
- **Greenhorn:** newcomer to the mountains
- **Heap:** very much, a lot, large amounts
- **Heely:** Gila River
- **It won't shine:** it's no good, I don't like it
- **Keep your nose open:** stay alert
- **Keep/watch your topknot:** don't get scalped
- **Lavé!:** get up
- **Long-knives:** American trappers
- **Meatbag:** stomach (as in "fill your meatbag")
- **Old Bullthrower:** Hawken's rifle
- **Old Ephraim:** male grizzly
- **On the prairie:** get something free
- **Painter meat:** panther, considered a delicacy
- **Plew:** prime beaver skin or pelt
- **Possibles sack:** small sack for carrying equipment and necessary items
- **Put afoot:** lose a horse
- **Raisin' or liftin' ha'r:** scalping
- **Robe season:** winter
- **Rubbed out:** killed
- **Seed-skee-dee:** Green River, a main trapping region
- **She-rip:** female grizzly (more dangerous than male)

- **Siree!:** yes, sir! (exclamation)
- **Skeared:** scared, afraid
- **Spoosa:** wife, from the Spanish *esposa*
- **Spree:** great time
- **Thar:** there
- **Thar goes hoss and beaver:** bad luck; oh well
- **That's the way the stick floats:** hard luck, fate
- **This hoss or child:** himself, or other mountain men
- **Tickle his fleece:** scalp
- **Varmint:** dangerous animal, as opposed to critters, which were usually harmless
- **Wagh!** (wahh!): exclamation of joy or contentment

### Sample of a trapper story:

## Me and Broken Hand

Broken Hand and me was squattin' down next to a fire down around the *Heely* one *robe season*, when some of our *companyeros*, who we'd thought *gone under* three years back, logged into our camp.

They war Black Harris, Hatchet Jack, and Jim Beckwourth. Said they'd been up on the Yaller Stone huntin' *plews* when they were attacked and almost turned into *doomed beavers*. We figured this to be a yarn.

Broken Hand and me offered 'em some '*bacca* and *Taos lightnin'* and they tore into it.

Awhile later, I was preparin' some buffler steak and *painter meat*. When the grub was ready, I said: "Hyar's the doin's, boys—freeze into it!" We all filled our *meatbags* and *got quite a glow*, especially from the boudins and hump ribs.

I noticed old Jack had got his *ha'r lifted* years back. He said, "Them *varmint*s the Rees done it down on the *Seed-skee-dee*." But he admitted, "*That's the way the stick floats*." This coon'll never get his *fleece tickled* again anyhow! *Wagh!*

We all filled our *meatbags* again and got ready to make tracks. Broken Hand and me decided we'd go to Californy over the same trail Old Diah Smith traveled over back in '26. Broken Hand had a notion to tie the knot with one of them black-eyed señoritas.

'Fore we made tracks, we told our *companyeros* we'd see 'em next rendezvous at Pierre's Hole. Tough old Jim told us: "*Keep your topknot*." I says to him, "Keep your'n." **Wagh!**

# Yarn Cards

These cards are intended to serve as yarn outlines. Students in their small fur-trapping parties will use these events and occurrences to “jump start” and advance the chain yarns they spin at individual “campfires.” Ideally, students will benefit by having copies of these cards.

<p><b>Hugh Glass</b> (a suggested outline)</p> <ul style="list-style-type: none"> <li>• Amazing skill with “old bull thrower” rifle</li> <li>• Attacked by a she-rip</li> <li>• Left to die; crawled/walked for six weeks to Fort Kiowa</li> <li>• Eating strange foods along the way</li> <li>• Getting lost in Yellowstone region with geysers and boiling mud</li> <li>• Arrow wounds healing</li> </ul> <p>Start: “It war back in ‘26 . . .”</p>	<p><b>Jed Smith</b> (a suggested outline)</p> <ul style="list-style-type: none"> <li>• Fight with a male grizzly bear</li> <li>• Crossing Mojave Desert during summer</li> <li>• Thirst, heat, near starvation</li> <li>• Eating strange desert plants and animals</li> <li>• Run-in with Mexican officials in California</li> </ul> <p>Start: “It war back in ‘26 . . .”</p>	<p><b>Pierre Luis Vasquez</b> (a suggested outline)</p> <ul style="list-style-type: none"> <li>• Being tortured by Indians</li> <li>• Living with critters</li> <li>• Stunts of bravery in front of captors</li> <li>• Scalping experiences</li> <li>• Stalking buffalo of different colors</li> </ul> <p>Start: “It war back in ‘21 when . . .”</p>
<p><b>Moses “Black” Harris</b> (a suggested outline)</p> <ul style="list-style-type: none"> <li>• Blizzards and freezing temperatures</li> <li>• Ways to find food</li> <li>• Attacked by wolves with human powers</li> <li>• Strange foods eaten to stay alive</li> </ul> <p>Start: “It war back in ‘26, I s’pose, when . . .”</p>	<p><b>Jim Beckwourth</b> (a suggested outline)</p> <ul style="list-style-type: none"> <li>• Fun at a rendezvous—games, stunts</li> <li>• Shooting and tomahawk-throwing contests</li> <li>• Prodigious amounts of whiskey and buefler steak consumed</li> <li>• Marrying into the Crow tribe</li> </ul> <p>Start: “It war back in ‘33 when . . .”</p>	<p><b>Joe Walker</b> (a suggested outline)</p> <ul style="list-style-type: none"> <li>• Crossing the Sierras into California</li> <li>• Seeing Yosemite Valley for the first time</li> <li>• Crossing a “river of mirrors”</li> <li>• Conversing with a grizzly bear</li> </ul> <p>Start: “It war back in ‘34 when . . .”</p>
<p><b>Jim Bridger</b> (a suggested outline)</p> <ul style="list-style-type: none"> <li>• Trapping competition—largest beaver</li> <li>• Successful fishing with a pole/line</li> <li>• Seeing a deer twenty-five miles away reflecting off an icy mountain</li> <li>• Chased by Indians</li> </ul> <p>Start: “It war back in ‘31, I s’pose, when . . .”</p>	<p><b>Thomas Fitzpatrick</b> (a suggested outline)</p> <ul style="list-style-type: none"> <li>• Wrestling a grizzly</li> <li>• Chased by hostile Indians and hiding in snake pit</li> <li>• Canoeing on rapid river</li> <li>• Eating strange foods</li> </ul> <p>Start: “It war back in ‘24 when . . .”</p>	<p><b>Zenas Leonard</b> (a suggested outline)</p> <ul style="list-style-type: none"> <li>• A beaver paradise in northwest Montana</li> <li>• Living with a female panther (mountain lion) in a cave on the Musselshell River</li> <li>• “Transparent” mountains</li> </ul> <p>Start: “It war back in ‘29 when . . .”</p>

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# Mountain Man Awards

## MOUNTAIN MAN AWARD Best Yarn Spinner in Trapping Party

*presented to*

\_\_\_\_\_

\_\_\_\_\_, 1837

*Head Mountain Man*

*Date*

## MOUNTAIN MAN AWARD

### Best Yarn Spinner in the Entire U.S. History Class

*presented to*

\_\_\_\_\_

\_\_\_\_\_, 1837

*Head Mountain Man*

*Date*

## MOUNTAIN MAN AWARD

### Fastest Runner through the Mountain Man Wilderness Gauntlet

*presented to*

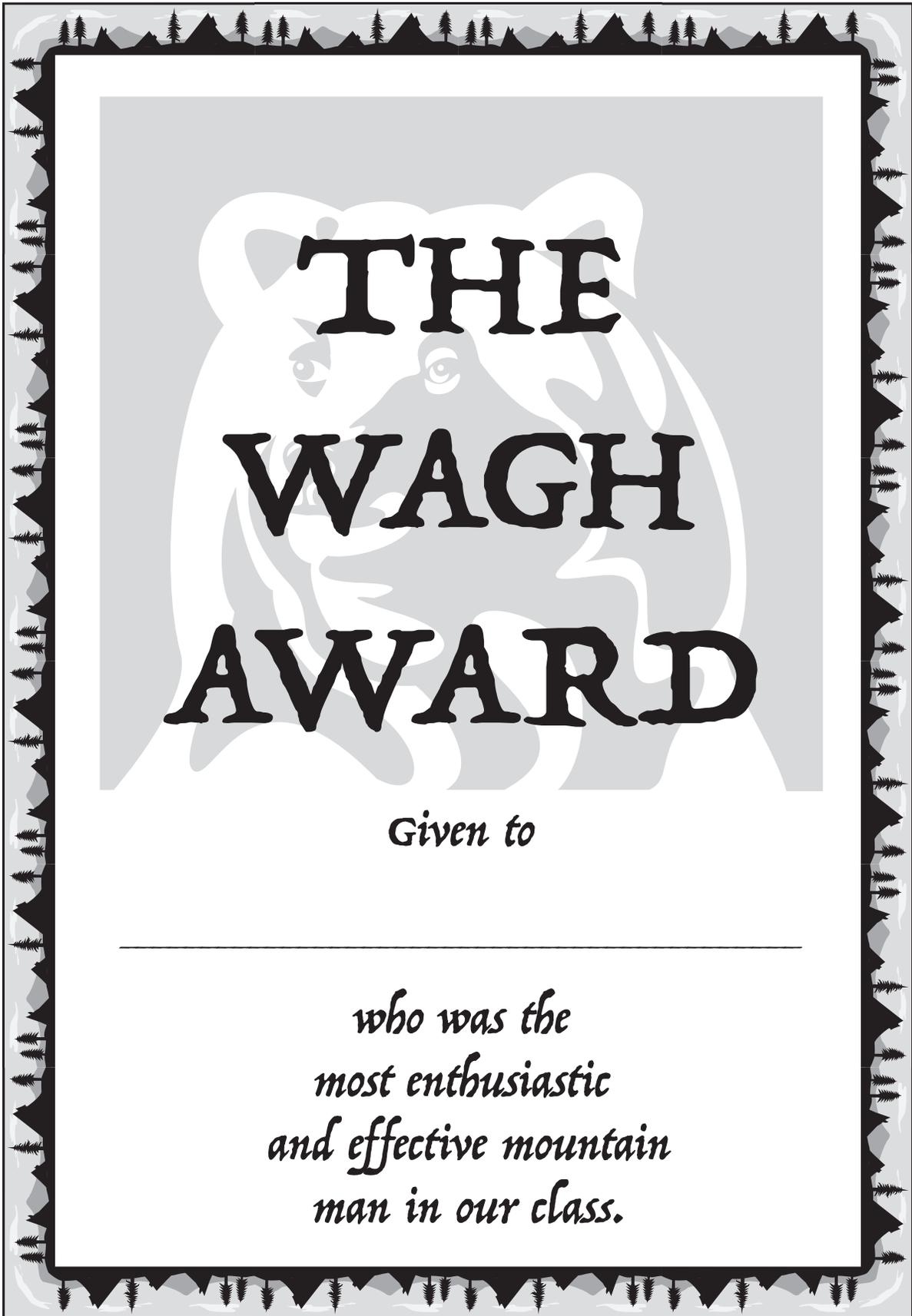
\_\_\_\_\_

\_\_\_\_\_, 1837

*Head Mountain Man*

*Date*

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# Postscript

When the mountain men were ready to trade, or sell their season's catch of "prime" beaver for pelts (aka skins or "plews"), they headed toward the annual rendezvous. This gathering of hundreds of trappers, Native Americans, and St. Louis merchants was held in a "hole," usually a wide, grassy valley in the central Rockies sometime during the first weeks of June.

The rendezvous, a concept first introduced by fur trade prime mover General William Ashley in 1825, was a mountain man happening from 1825 to 1840. Sites for the sixteen yearly events were in the midst of America's most rugged yet beautiful landscape. Although the majestic Grand Tetons and Jackson Hole were never chosen, the area around the Green River, in present-day Wyoming, saw the lion's share of rendezvouses.

When the time came for rendezvous, bearded mountain men with their fur-laden pack mules came from all over the West. As they set up camp, the St. Louis caravans arrived to set up their tables and display their wares. Negotiating the prices for individual skins was mostly an exercise of futility for the trapper. The merchants told the trappers what the rate would be this year, and that was that, depending on certain qualities of individual pelts. It was the "only game in town," and the trappers, who weren't going to make huge profits anyway, accepted, commenting, "That's the way the stick floats."

Once paid, the money was quickly spent on necessities like blankets, gifts for Native American wives, a new Hawken's rifle, a Green River knife, and perhaps a different hat.

Generally, each pelt went for five or six dollars more in 1830, less in 1838, when the silk trade threatened to reduce trapping to a casual occupation. What remained after the merchant-trapper swap went for "medicine water" (a combination of pure alcohol and whiskey, colored with tobacco). Finding the large barrels and jugs of the lethal fluid, mountain men drank until they vomited, and then kept drinking until, as it often happened, they passed out. It was the once-a-year celebration for many mountain men and the rendezvous lasted for two weeks.

Some trappers reacted belligerently to the alcohol. These men challenged others to sadistic duels and fights—a rifle duel at twenty paces, a distance almost guaranteed to cause not one, but two deaths. At one rendezvous, a man awoke because someone had lit his hair on fire.

Just as diverting, but less barbaric, were competitive activities such as horse riding, target shooting, footracing, and fistfighting. Then there were the ladies—Native American women brought to the rendezvous by their fathers, who were anxious to use the income to add new horses or rifles to their possessions.

Two weeks of rendezvous was enough. Often with world-class hangovers and with little or no money left to show from a year's trapping, mountain men stumbled out of camp with their new acquisitions (a wife? a rifle?) to head for their fall trap-lines. Thus, they would continue the year's routine which would bring them back to rendezvous the next year with more packs of "brown gold."

By the mid- to late 1830s, it was clear to the Rocky Mountain trapper that the golden age of the beaver trade, brief as it was, was nearing an end. The animal itself, after two full decades of being overtrapped, was in danger of extinction. Severe competition among rival companies, which caused a drop in fur prices, was another blow to the trade. A further cause for the decline was the harsh winter of 1836–1837, which killed off many young beavers.

Native American hostility resulting from a smallpox epidemic added to the list of reasons, and, perhaps most important, beaver fur went out of fashion as a material for hats. It was replaced by silk, now being imported to the United States and Europe by clipper ships from China and Japan.

Most beaver hunters—the mountain men surviving until 1840—were savvy enough to see signs of a declining industry and take up other occupations all over the West. Trails they themselves had blazed needed scouts and interpreters to guide wagon parties; forts along these trails needed to be built and maintained by experienced frontiersmen; and towns, built where mountain men spun yarns around campfires, needed citizen-leaders. Thus, our mountain men “fur fathers” would continue to nurture the nineteenth century’s westward movement.



*Image Source: iStock/nicoalay.*

# Historical Investigation Activity

## *Mountain Men Rendezvous (1837)*

By Bill Lacey



### Focus Question

Mountain man and trailblazer Jedediah Smith: Was he an American spy?

### Materials Needed for This Historical Investigation

- **Documents A–F**—*class set*
- **Points to Ponder Response Sheet**—*class set*

### Lesson Plan

#### 1. Getting Started

- Whether you did the Activator on the mountain men or not, review or find out what your students know about this “reckless breed of men,” their importance in the early westward movement from 1800 to 1850 and hopefully some of the individuals who gloried in the name—mountain men, “some of American history’s most rambunctious hyper individualists.” Put responses on the board as spokes of a wheel with the hub labeled “Mountain Men.” The discussion that follows should serve as a lead-in to the backstory, the **Focus Question**, and the documents that students will shortly analyze.

#### 2. Backstory to Use as Instruction

- In the 1820s and 1830s young men who couldn’t see farming or shopkeeping in their futures headed West to seek personal freedom; several hundred became mountain men: fur trappers who roamed the Far West trapping, skinning, and then selling beaver pelts (“plews”) to St. Louis merchants. Those merchants came into the Rockies once a year at the annual rendezvous to buy the pelts and fleece the trappers with high prices for essential goods. The furs would eventually become hats to be worn by fashionable male dandies in cities in Europe and the eastern United States.
- Arriving in St. Louis, the fur depot and launchpad into the West, most would-be mountain men joined trapping companies and brigades into the Rockies, the Mexican Southwest, and the British-controlled Northwest. As employees of a fur company, they not only blazed trails—identifying the locations of mountain passes, river systems, dangerous Indians, critters (grizzlies, snakes, and other “varmints”), and rival fur companies—but also gauged the strength of the Mexican and British control over any areas they held.

## Mountain Men Rendezvous: 1837

### Historical Investigation Activity



- Of these mountain men, one stood out as a leader and intrepid trailblazer: Jedediah Strong Smith. As Captain Smith or “Old Jed,” he led his men into regions of the West no American had seen and, as he did, racked up a slew of accomplishments, as well as surviving incredible disasters in his far-reaching travels over a brief nine-year career in the fur trade. He was:
    - first to lead not one but two overland expeditions to Mexican California from 1826 to 1828 (expeditions during which he was briefly imprisoned twice!)
    - first to lead a band of trappers north from California into Oregon territory
    - the first Anglo-American to cross the rugged Sierras west to east
  - Though Jedediah himself survived several Indian attacks, under his command many of his fellow trappers were killed and most of his beaver pelts were lost. Yet, his fame as a trailblazer and frontier role model endures. Many believe his uniqueness among mountain men helped further his legendary and iconic status among our “fur fathers.” Unlike most of his ilk, Jed was religious and did not drink or smoke.
  - Exploring and trailblazing were his primary goals as he himself wrote:

“I wanted to be the first to view a country on which the eyes of a white man had never gazed and follow the course of rivers that run through a new land.”
  - Jedediah Smith’s fame is secure, and he usually receives at least a paragraph or two in most history textbooks. Besides personal adventure, fur trade profits, and wanderlust, were there other reasons for Jed to explore regions of the Far West, where Mexicans in California and the British in the Northwest held sway? Was Jedediah Smith trailblazing for another reason? Was he, like Captain Benjamin Bonneville of the U.S. Army and his mountain man guide, Joe Walker, a few years after Smith, gathering information-intelligence (“intel”) for American government officials, who were desirous of these Western territories as future states? All this in the grand plan of an expanding American continental empire (“Manifest Destiny”)—all the way to the Pacific. Was Jed Smith, in short, a government agent and a spy?
3. Say to students, “The documents we will analyze present a reasonable argument for such a theory—‘spy theory,’ as one scholar has phrased it. Jed Smith kept a diary-journal, as did his assistant, Harrison Rogers. He drew maps and he, thankfully, being literate among many illiterate trappers, wrote letters. His journal entries and letters will be included in the document package.”



4. Pass out the **Points to Ponder Response Sheet** and allow five minutes for students to write their responses to #1. Discuss those responses, and augment the dialogue with the possibility that “spy” might be too harsh a term for what Smith allegedly did—gather information and pass it on to government officials. Emphasize that students are charged with the task of deciding if evidence in the documents is strong enough to support the claim of Smith as a U.S. government agent-spy. Giving the students this definition might advance the discussion:

### Definition of a “spy”:

- An agent employed by a state or government to obtain secret information concerning its potential or as actual enemies or rivals.
  - One who secretly keeps watch on others.
5. Pass out the package of **Documents A–F**. Say, “What do the documents tell us and what can we conclude? That’s our task.” It may be wise to read aloud the first one or two documents and go over what each says. Remind students to work through the documents carefully. Once done, release students in small groups (pairs or trios) to work.
  6. Allow forty to fifty minutes for students to read the documents, discuss, and fill in the **Points to Ponder Response Sheet**.
  7. Then discuss thoroughly and have students write their answers to the **Focus Question**. Have volunteers read their answers to conclude the activity.

Name \_\_\_\_\_ Date: \_\_\_\_\_

# Points to Ponder Response Sheet

**Focus Question:** Mountain man and trailblazer Jedediah Smith: Was he an American spy?

1. I think a proper definition of spy and/or government agent might be:

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What images of a spy come to mind when you hear the word?

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Should spies be considered spies if gathering information/intelligence is not intentional or has none of the trappings we associate with modern spying (e.g., small cameras, dead of night with flashlights, etc.)?

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2. **Document A:** What words or phrases in Foss’s poem might apply to the career of Jedediah Smith?

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3. **Document B:** In his three years of travel (1826–1829) in the Far West, Smith experienced problems in the Mojave Desert and on the Umpqua River in the Oregon territory (with Indians), in Mexican California (he was imprisoned twice), and in the Northwest (where the Hudson’s Bay Company held sway). Use a measuring device to chart how many miles Smith traveled in these three busy years. (Use the scale in the lower left corner.)

Approximate number of miles: \_\_\_\_\_

Impressive as this appears to be, does it diminish the criticism of losing most of his men and furs, plus antagonizing both the Mexicans and the British?

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4. **Document C:** What is Smith’s attitude toward “Spaniards” in California as he approaches their settlements?

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What does he blame for this jealousy between Anglos and Mexicans?

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One historian has called Smith a liar and “disingenuous” (crafty, not straightforward or candid). What evidence is there in the last paragraph of this journal entry that might support this description?

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5. **Document D:** What kind of information or intelligence does Smith supply to General Clark in his letter of July 12, 1827?

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The Mexican governor granted Smith permission to depart from Southern California by the same route he entered months before. What did Smith do in response to the governor’s request? (look at **Document B** again)

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6. **Document E:** Who received Smith’s letter?

What other nations are involved in this letter? \_\_\_\_\_

What five pieces of information from Smith’s letter might be valuable to the U.S. government?

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Why would secrecy be necessary if both the British and the Americans were given joint occupation of the Oregon territory by the Convention of 1818?

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7. **Document F:** How was Smith a man of his times?

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---

How did other nationalities and certain Indian tribes view Jed Smith?

---

---

What words or phrases in this document suggest that Smith was a "sly Yankee?"

---

---

Why would Smith have prejudice against "Spaniards" (Mexicans) and Indians?

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8. Based on the documents you analyzed, write a lengthy paragraph answering the **Focus Question** at the top of this sheet. Make at least three major points to substantiate your claim.

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9. If you could ask Captain Jedediah Smith one question, what would it be and how would he answer it?

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# Document A

## **“The Coming American”: A Poem by Sam Walter Foss**

Sam Walter Foss (1858–1911) was for most of his life a librarian and a poet. For years, these opening lines to his poem “The Coming American” were inscribed on a granite wall at the U.S. Air Force Academy. In 2003, the words were removed when the academy became coed. Now the same words are inscribed at Disney’s Epcot in Orlando, Florida.

*“The Coming American”*

*Bring me men to match my mountains,*

*Bring me men to match my plains,*

*Men with empires in their purpose,*

*And new eras in their brains.*

Source: Sam Walter Foss, “The Coming American” (1894).

# Document B

Map of Jedediah Smith's Travels, 1826-1829



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# Document C

## Journal Entry by Jedediah Smith While in Mexican California

Smith led an expedition of trappers twice into Mexican California, the first one in 1826. This entry was written as he approached a California mission.

*It would perhaps be supposed that after numerous hardships endured in a savage and inhospitable desert I should hail the herds that were passing before me in the valley as harbingers of better times. But they reminded me that I was approaching a country inhabited by Spaniards. A people whose distinguishing characteristic has ever been jealousy a people of different religion from mine and possessing a full share of that bigotry and disregard of the rights of a Protestant that has at times stained the Catholic Religion.*

*They might perhaps consider me a spy imprison me persecute me for the sake of religion or detain me in prison to the ruin of my business I knew such things had been and might be again. Yet confiding in the rectitude of my intentions I endeavored to convince myself that I should be able to make it appear to them that I had come to their country as the only means by which I could extricate myself from my own embarrassing situation and that so far from being a spy my only [wish] was to procure such supplies as would enable me to proceed to my own country.*

Source: *The Southwest Expedition of Jedediah S. Smith: His Personal Account of the Journey to California, 1826–1827* (Glendale, CA: Arthur H. Clark, 1977).

# Document D

## Smith's Letter to General William Clark

Smith had only recently completed his first expedition to Mexican California when he wrote this letter.

July 12th, 1827

Gen Wm. Clark,

Supt. Of Indian Affairs

Sir,

My situation in this country has enabled me to collect information respecting a section of the country which has hitherto been measurably veiled in obscurity to the citizens of the United States—I allude to the country S. W. of the *Great Salt Lake* west of the Rocky Mountains. . . .

On my arrival in the province of Upper California, I was looked upon with suspicion, and was compelled to appear in presence of the Governor of the Californias residing at St. Diego, where, by the assistance of some American gentlemen (especially Capt. W. H. Cunningham of the *ship Courier* from Boston) I was enabled to obtain permission to return with my men the route I came, and purchase such supplies as I stood in want of.—The Governor would not allow me to trade up the sea coast towards *Bodaga* [north of San Francisco Bay]. I returned to my party and purchased such articles as were necessary, and went eastward of the Spanish settlement on the route I had come in. I then steered my course N. W. keeping from 150 to 200 miles from the sea coast. . . .

Yours respectfully,

Jedediah S. Smith

of the firm of

Smith, Jackson & Sublette

Source: Dale L. Morgan, *Jedediah Smith and the Opening of the West* (Indianapolis, IN: Bobbs-Merrill, 1953).

# Document E

## Smith's Letter to Secretary of War John H. Eaton

By the time Smith wrote this letter to Secretary Eaton, he had completed most of his far West expeditions. In the spring of 1831, months after penning this letter, he led an expedition to Santa Fe but was attacked and killed by Comanche Indians.

[To the Secretary of War John H. Eaton]

St. Louis, October 29, 1830.

Sir: The business commenced by General Ashley some years ago, of taking furs from the United States territory beyond the Rocky mountains, has since been continued by Jedediah S. Smith, David E. Jackson, and William L. Sublette, under the firm of Smith, Jackson, and Sublette. They commenced busines[s] in 1826, and have since continued it; and have made observations and gained information which they think it important to communicate to the Government. . . . Thus this territory [Oregon], being trapped by both parties, is nearly exhausted of beavers; and unless the British can be stopped, will soon be entirely exhausted, and no place left within the United States where beaver fur in any quantity can be obtained.

The inequality of the convention with Great Britain in 1818\* is most glaring and apparent, and its continuance is a great and manifest injury to the United States. The privileges granted by it have enabled the British to take possession of the Columbia river, and spread over the country south of it; while no Americans have ever gone, or can venture to go on the British side. . . .

As to the injury which must happen to the United States from the British getting the control of all the Indians beyond the mountains, building and repairing ships in the tide water region of the Columbia, and having a station there for their privateers and vessels of war, is too obvious to need a recapitulation. The object of this communication being to state facts to the Government, and to show the facility of crossing the continent to the Great Falls of the Columbia with wagons, the ease of supporting any number of men by driving cattle to supply them where there was no buffalo, and also to show the true nature of the British establishments on the Columbia, and the unequal operation of the convention of 1818.

These facts being communicated to the Government, they consider that they have complied with their duty, and rendered an acceptable service to the administration; and respectfully request you, sir, to lay it before President Jackson.

We have the honor to be sir,

Yours, respectfully,

Jedediah S. Smith, David E. Jackson, W. L. Sublette.

\*Note: The Convention of 1818 fixed the boundary between Britain and the United States at the 49th parallel and thus opened Oregon to joint occupation—essentially making settlement, and thus control, competitive.

Source: United States Senate, *Pubic Documents Printed by Order of the Senate of the United States at the Second Session of the Twenty-First Congress, Begun and Held at the City of Washington, December 6, 1830, and in the Fifty-Fifth Year of the Independence of the United States* (Washington: Duff Green, 1831).

# Document F

## Jedediah Smith: Jacksonian Expansionist and Bigot?

For years, the standard text on Smith was Dale Morgan's *Jedediah Smith and the Opening of the West*. In 2009, historian Barton Barbour offered a fresh interpretation of America's premier trailblazer, citing his sufferings, bitter defeats, and disasters, and offering an honest assessment of his motives.

Modern-day Americans who familiarize themselves with Smith's life will better appreciate the convergence of powerful social, economic, and political currents that persuaded U.S. citizens to believe, for better or worse, that their nation's future power depended upon territorial expansion to the Pacific coast.

Jedediah Smith's personality, attitudes, and behavior exemplify some of the bright and promising aspects of our national character, but they also reveal less appealing features such as Americans' habitually negative opinions about "Spaniards" and Indians. . . .

. . . [R]egarding his troubles in California. For many years Jedediah's version of these events has been accepted without much criticism. Recently discovered evidence, however, casts doubt on Smith's account and suggests that he was at best disingenuous and at worst a determined liar, truly the sly Yankee that Mexican authorities feared. . . .

To be sure, not all the people with whom Jedediah Smith interacted thought highly of him. Contemporary Mexicans had reason to consider Smith a spy, or at least a snooping intruder in California. To British-Canadian competitors he presented an economic threat, and they generally characterized him as a "cunning Yankey." Many Indians, particularly Arikaras, Mohaves, and the northern California and Oregon tribes, likewise viewed Smith and his men with grave misgivings. . . .

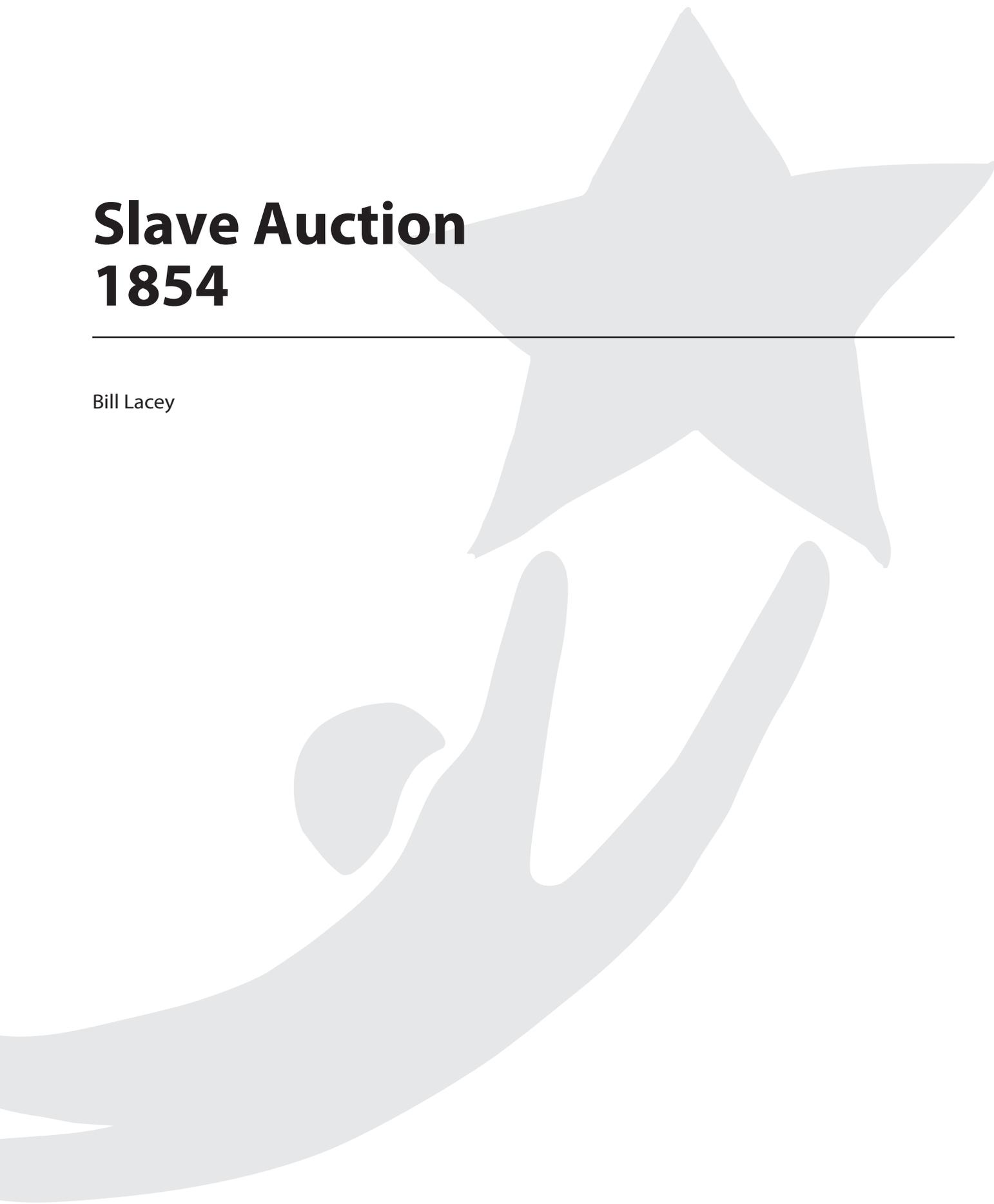
Jedediah Smith is now assured a permanent and prominent place in the annals of North American exploration. He will ever stand in the first rank of great explorers. And yet, it would not do to forget that Smith was surely a man of his time. Embracing the exuberant promise of a great American future, he was sometimes an ardent expansionist and always an economic go-getter. Reflecting the crosscurrents of inconsistent ideology in Jacksonian America, Jedediah was simultaneously pious, humanistic, and bigoted.

Source: Barton H. Barbour, *Jedediah Smith: No Ordinary Mountain Man* (Norman: University of Oklahoma Press, 2009).

# Slave Auction 1854

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Bill Lacey



# Lesson Plan

**Warning:** This Activator involves sensitive subject matter and may evoke strong emotions. Make sure that your students are prepared for intense experiences, and that you review the contents fully before staging the Activator.

## Overview

This Activator will involve your students in one of history's most degrading spectacles—a Southern slave auction taking place just before the American Civil War. Your class will re-create the buying and selling of Africans from an auction block during an era when slavery was an integral part of the South's plantation economy. Southerners themselves defended the inhumane system by calling it their "peculiar institution."

## Setup

### 1. Duplication

- **Background Essay**—*class set*
- **Postscript**—*class set*
- **Slave Sales Economics**—*class set*
- **Auctioneer Profile**—*one* for each auctioneer
- **Slave Information Sheet**—*one copy* for each student playing a slave
- **Slave Profiles**—cut up and handed out to individual slaves
- **Buyer Profile**—*one copy* for each student playing a buyer
- **Identity and Allotment Slips**—cut up and handed out to individual buyers

2. **Schematic, props, costumes:** Study the **Schematic** carefully. Find and bring into your classroom any props and costumes that will create the setting and the mood of a slave auction. Of course, ask students to help with any props and costumes they might find.

### 3. Roles

- a. Some little prop or costume (slaves can be barefooted) will differentiate buyers from slaves. Allow a day or two for students to think about and locate costumes and prop pieces.
- b. Here are the roles you will need: two to three auctioneers, fifteen to twenty slaves (about half the class), ten to twelve buyers, one or two of whom will help bring in slaves.
- c. Assign all roles by chance unless you have two to three students who have a talent for rapid auctioneer patter. Have your entire class

#### Teaching tip

Your students can help you find bits and pieces of slave attire to enhance the drama and realism of this Activator.



#### Teaching tip

There are only sixteen slave profiles. If you need more, have students create more.



randomly select an **Identity and Allotment** slip or a **Slave Profile** slip from a hat or small box. Do this a day or two before the Activator.

- d. Give members in each group their appropriate handout. Don't forget the auctioneers.
  - e. **Note:** Above all, do not let anyone use the "N" word or other equally demeaning words and phrases. Stress how you wish to find a middle ground where the slave sale is realistic while everyone works to maintain a situation in which no one is personally humiliated and degraded. *Realize that this will be no simple task.*
4. **Narrator(s):** Unlike some other Activators in this series, there is no narrator in this Activator. The auctioneers' role and your direction as "a guide on the side" must give chronology and order to the proceedings as the action takes place.

## Directions

1. Either hand out the **Background Essay** as homework the day before class or pass it out now. If you have given it as homework, conduct an informal discussion of the main points brought out in the essay. If you are passing out a class set of the essay now, read the essay aloud to the students as they read with you. Pause to explain the main points. (This choice, of course, is determined by the reading level and age of your students.)
2. Display the **Schematic**, explain it, assign roles, and then have students rearrange the classroom to create the setting.
3. Have all students move to their positions. This means the coffle of slaves is in a "slave pen" and the auctioneers are ready to begin their spiel.

You have at least two different ways to conduct the Activator:

### Option A

1. Assign all roles by chance.
2. Tell students to get into costumes and place themselves in the room according to the **Schematic**.
3. You, as teacher, play the auctioneer and slowly direct your students' movements, actions, and reactions. Explain and elaborate as you go through the **Auctioneers' Profile** sheet. Improvise as needed and answer students' questions as they arise.



#### Teaching tip

**Flourishes:** Have your custodian and/or drama teacher help you set up risers for the auction in your classroom.



#### Teaching tip

You could play a spiritual or "Dixie" as students arrange the classroom.

### Teaching tip



**Motivation:** Tell students that one former slave, Solomon Northrup, recalled that the daily quota for cotton picking was around two hundred pounds a day. This statistic will amaze your students!

### Teaching tip



Consider using the **Slave Sale Economics** with either debriefing.

## Option B

1. Assign roles a few days in advance of using this Activator.
2. Using the **Schematic**, explain what will happen. Then rehearse for several minutes.
3. When everyone is ready, allow the auctioneers to begin the Activator and proceed until the last slave is sold. A banging of the gavel and announcing of the auction's termination should formally end the activity.
4. If possible, plan to film the proceedings. This video will give you an excellent vehicle to use during the debriefing.

## Debriefing

Decide whether you wish to use a short or long debriefing. Here are possible ways to make meaningful what happened during this Activator:

### Short Debriefing

1. Pass out the **Postscript**. Either read this to your students or summarize the main points of each paragraph before continuing.
2. Ask students to discuss what they learned and what they felt as they played their roles as auctioneers, slaves, or buyers.
3. Consider having students write a Learning Log entry following the debriefing. Writing these logs will help students crystallize their understandings of the historical content as well as their feelings while playing roles of those involved in one of U.S. history's most degrading spectacles—a slave auction.

### Long Debriefing

Use one or more of the following debriefing activities:

1. Pass out the **Postscript**. Either read this to your students or summarize the main points of each paragraph before going on.
2. Discuss with students what it felt like to be 1) a slave being sold like a used car or horse; 2) an auctioneer making his living by selling human flesh; 3) a buyer paying cash for human beings and actually owning them.
3. Have students draw a large outline of a person's head. Then, inside, write all the opinions/myths that Southerners held about African Americans before the Civil War. **Ask students:** *After taking part in a slave auction, what do you think these opinions and myths were based on?* Conduct a discussion on what students wrote.

4. In the 1980s, Japanese Americans demanded and received financial reparations from the U.S. government as amends for the unconstitutional imprisonment of some 110,000 Japanese Americans during World War II. **Ask students:** *Do you think this action was justified? Are the American people sometimes responsible for righting past wrongs? Could a similar case be made for the inhumane treatment blacks were subjected to before and after the Civil War?*
5. Hand out or display **Slave Sale Economics** and review its contents. What would a "slave" cost today relative to goods and services?
6. Have students consider what they learned from this Activator by writing down all the rights and liberties in the Bill of Rights and other amendments that were violated during a slave auction.
7. Using a ledger format, write on the board all the similarities between a slave sale and a used car sale.

Slave Sale	Used Car/Horse Sale
• Examined teeth	•
• Scars meant not a good buy	•
•	•

8. **Ask students:** If you were a former slave who experienced toiling on a small farm or plantation, being sold two or three times on an auction block, being separated from your spouse and children permanently, and then escaping along the Underground Railroad to freedom, what title and subtitle would you give your autobiography?
9. Show students a portion of the TV miniseries *Roots*. One appropriate segment early in the series illustrates the brutality and degradation of a slave auction.
10. **Discuss:** Are there any segments of our population today that are "enslaved" in any way?
11. Have all your students write a Learning Log entry about their slave auction experiences. They'll likely want to share what they have written.



**Teaching tip**

Encourage your students to do this activity seriously. Humor is inappropriate.

Teaching tip

This student's Learning Log



assuredly shows the power of a vicarious experience to impact a young mind. Expect your students to also be dramatically affected by what happens during your slave auction.

Write a Learning Log ...

**Learning Log**  
**Slave Auction Activator**

I was an auctioneer in today's slave auction Activator. When Mr. Williams assigned me this role, at first I really anticipated being someone who was going to have lots of control. Before the auction began, I enjoyed helping make name tags for all the students who were going to be slaves.

After the auction began, Susan Andrews and I really took charge as auctioneers. We used many of the phrases to describe the slaves we were trying to sell. I remember saying "fine young buck" when trying to sell Gregg Standish. At first, everyone sort of grinned, but soon it wasn't funny anymore. Students playing buyers started making remarks about Gregg that were in poor taste. The whole thing became a little sordid and pathetic as class members played their roles.

I found the debriefing very interesting. We began talking about how it just wasn't right that one human being could ever control another person's life. How could anyone feel he could own someone's body? Tammy pointed out how she felt like she was an "object" rather than a human being while she stood in front of us and everyone was talking about her as if she were a sack of potatoes. I don't think we'll forget ...

Resources to consult

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- Lester, Julius. *To Be a Slave*. New York: The Dial Press, 1968. (An easy-to-read personal narrative written by a former slave.)
- Mellon, James, ed. *Bullwhip Days: The Slaves Remember—An Oral History*. New York: Grove, 1998.
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## Visual history

**Miniseries:** *Roots* (1977), starring LeVar Burton and a distinguished cast, has a lengthy scene of a slave auction during which Kunta Kinte is auctioned off along with other slaves.

# Background Essay

**Place:** Natchez, Tennessee

**Time:** March 1854

## **Slavery**

Certainly not unique to nineteenth-century United States, slavery in the broadest sense—the practice in which one human literally owns and controls other human beings—extends back at least three thousand years. It existed in Old Testament times and in Greek and Roman societies. Very often, slavery resulted from military conquest. As the power of Rome faded and feudal kingdoms appeared in Europe, slavery took the form of feudalism, wherein peasants were bound to work for a lord. As Europe slowly transformed from a medieval to a more modern society, Europeans began to explore lands across the seas. Portuguese, Spanish, English, and Dutch captains ventured along the coast of Africa, captured Africans who lacked firepower to defend themselves, and thus initiated a profitable, if evil, slave trade. Ironically, slavery was being practiced among differing African societies at this same time.

## **Jamestown and early slavery**

Eventually, this prosperous international slave trade reached the shores of the newly explored continent of North America. In 1619, the young English colony of Jamestown, Virginia, struggling to survive its first dozen years, accepted a cargo of twenty African slaves off of a Dutch ship. From that momentous event, so innocent at the time, slavery became an entrenched system in British America and, eventually, in the United States. While slavery existed in the northeast colonies, it was deemed vital to the Southern economy. Africans were needed on the large cotton, tobacco, and rice plantations. Southerners had a fixed idea that blacks, taken from tropical Africa, could work easier and longer than white colonists and endure the broiling summer sun.

## **The “peculiar institution”**

By the early nineteenth century, slavery was an integral part of Southern life. It was accepted that Africans were an inferior people. When the system was attacked by those from Northern states, Southerners, even those who only dreamed of owning slaves, rose to its defense. They quoted the Bible (Abraham and other Old Testament men had slaves) and pointed out that some of the Founding Fathers (George Washington and Thomas Jefferson) held several hundred slaves. Slavery became the South’s “peculiar institution.” Southerners defended slavery passionately during simple private arguments and on the floors of state legislatures and the national Congress.

## **Abolitionists**

Just as unbending as slavery’s defenders were the attacks from a vocal but growing number of abolitionists, especially after the publication of the *Liberator* in 1831. William Lloyd Garrison, the newspaper’s publisher, gave slavery’s abolition its strongest voice; he would, over the next thirty years, convince millions of Americans in the North that slavery, the South’s peculiar institution, was evil. Along with Theodore Dwight Weld, Theodore Parker, the Grimke sisters, and others, leading abolitionists eventually would see slavery and its odious slave auctions destroyed.

## **Underground Railroad**

One way abolitionists could speed up their noble cause and liberate slaves from their masters was to assist those in bondage to escape along what became known as the Underground Railroad. To be factual, these ingenious network pathways out of the South were neither underground nor railroads. Of course, those who arranged and organized these escapes, like Harriet Tubman and

Sojourner Truth, were not actually “conductors.” The Underground Railroad was a network of many homes whose owners agreed to hide and pass on escaping slaves as they worked their way north. From the 1830s to 1860, this “railroad” helped hide and transport hundreds of escaped slaves fleeing from bondage into the North or Canada. Harriet Tubman, one famous “conductor,” made nineteen trips into the South and helped three hundred slaves escape. For those who did not escape, life in bondage continued.

### **Slavery . . . dawn to dusk**

No historian can specify what actually happened to slaves on each small farm or plantation during a typical work day, for the workload and treatment of slaves varied greatly. Most slaves worked long hours doing jobs no white man wanted to do. (An interesting fact is that many slaves did not live on plantations with a great number of other slaves; a considerable percentage lived in small clusters on small farms.) Field hands, whether on plantations or small farms, harvested tobacco, rice, sugar, and cotton, especially after Eli Whitney’s gin dramatically increased production. Slaves with special skills such as carpentry or sewing worked near or in the master’s house.

How slaves were treated depended on several things: the attitude of the individual slave toward the work, how cooperative owners were, and the mood of the small farm owner or plantation owner and his overseer. Some slaves were treated as live-in employees and were fed an adequate, varied diet. Others were punished severely for infractions, were fed a monotonous diet, and were generally treated in a manner that matched the stereotypes portrayed in Harriet Beecher Stowe’s *Uncle Tom’s Cabin*.

### **Slave sale**

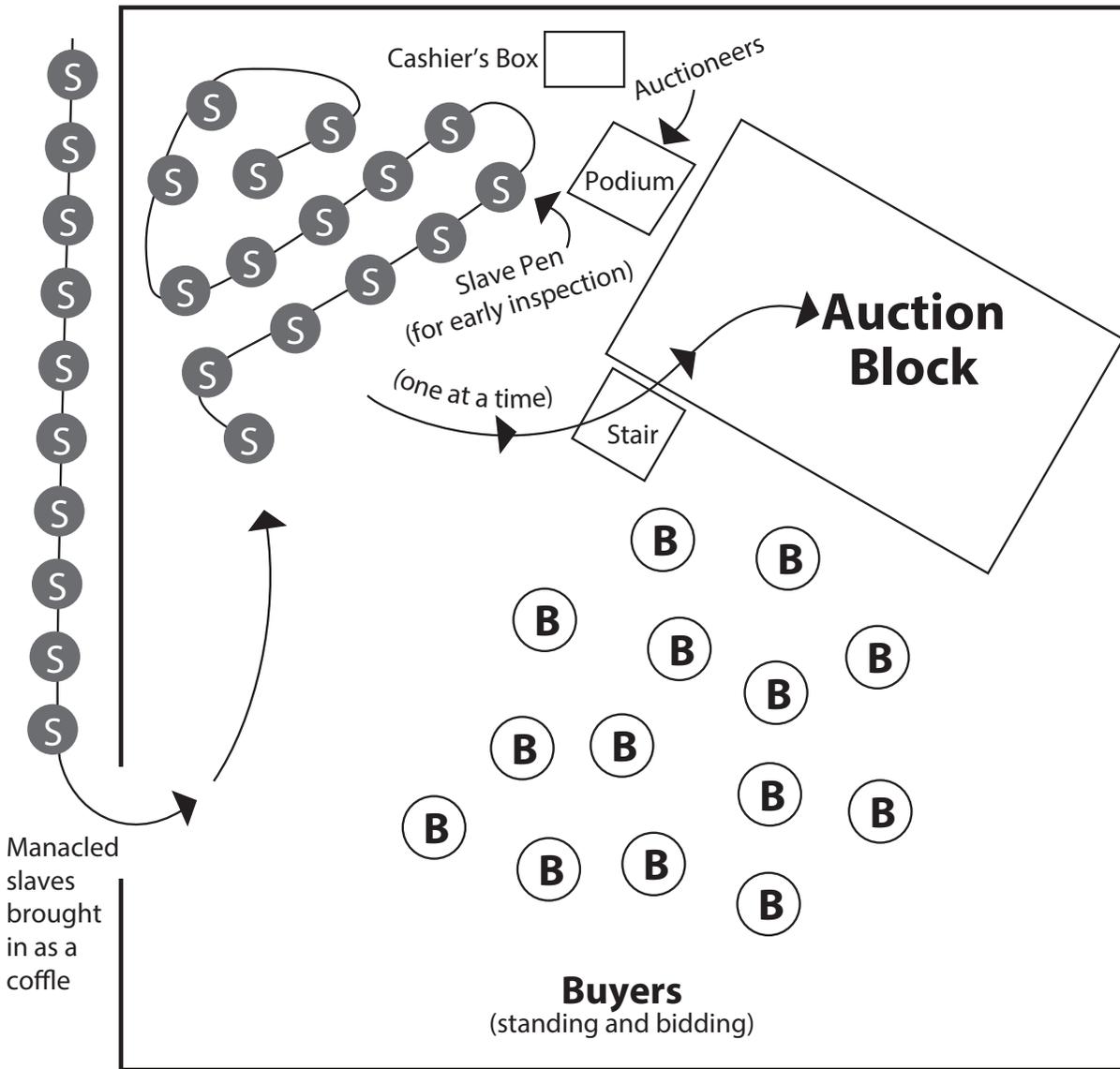
For whatever reasons, Southerners often sold their slaves. In this case, brokers in the region were notified to begin advertising, which usually meant printing eye-catching broadsides and disseminating the news locally. Slave sales (i.e., auctions) were common at advertised sites in towns and cities. At the designated time, day, and place, prospective buyers would arrive early to view the slaves, much as car buyers today examine carefully what they are considering purchasing. They searched for qualities that would make the ideal slave—docility, strength, and health. They also looked carefully for the following: intelligence, any special talents, and whip marks indicating rebellion or possible future runaways. While examining female slaves, purchasers were often looking for women who could breed more children. Slave children were generally considered useless until seven or eight years old. They were called “quarterhands” until adulthood because they did a fraction of the work. At the auction, slaves could be separated from their families. Slave owners were willing to pay in the vicinity of three hundred to seven hundred dollars or more for a slave.

### **Get ready to bid . . . or be sold**

If you are chosen to portray a slave on the auction block, prepare to show your best feature, or at least play the character’s profile you are given. Likewise, if fate makes you a small farmer or plantation owner searching for some new slaves to work your land, cook your meals, or raise your children, play your role to the hilt. If you are an auctioneer, take charge of the proceedings. Whatever your role in this Activator, act in a mature manner. Now . . .

***“We’ll start the bidding at one hundred dollars!”***

# Schematic



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## Suggestions

- Use risers to elevate slaves on the auction block.
- “Manacle” slaves with one long rope tied loosely around their ankles.
- Allow five to ten minutes for slave pen inspection.
- Award each buyer with various amounts between \$600 and \$5000 to spend during bidding.

- Alternate auctioneers.
- Use one to two buyers (or auctioneers) to bring in slaves.
- Start bids at \$50 minimum
- Make clear to everyone that this Activator must be carried out with decorum and in good taste.

## Characters needed

- Slaves (15–20)
- Buyers (10–12)
- Auctioneers (2–3)

# Slave Profiles

## Caesar

- Age 40
- Has musical ability (plays the guitar)
- Has servant skills for "big house"
- Has storytelling skills

## Willis

- Age 28
- Good with animals
- Has bad back
- Possible house servant
- Mechanical abilities

## Nat

- Age 6
- Son of Jack and Deliah

## Jack

- Age 27
- Intelligent, husband of Deliah and father of Nat
- Good with horses; coachman

## Fred

- Age 52
- Kindly
- Good health for advanced age and years of toil
- Would make good house servant
- House painter

## Pompey

- Age 24
- Very muscular and strong
- Sullen: never smiles or laughs
- No history of striking back or escaping

## Ben

- Age 45
- Rebellious nature with visible scars
- Has "spirit"
- Strong; will make good field hand

## Duke

- Age 32
- Has leadership ability
- Cooperative
- Can read
- Loyal
- Of good character

### Josie

- Age 12
- Child of Venus
- Can do some difficult housework and cooking

### Delicia

- Age 30
- Has sewing skills; ironer
- Good with children and pets
- Healthy

### Venus

- Age 35
- Can cook for large numbers
- Mother of six children
- Cooperative

### Ida

- Age 24
- Skilled field hand—picking cotton, especially
- Hearing loss in both ears
- Religious—spiritual leader; emotional—high-strung

### Deliah

- Age 28
- Nervous disorder
- Sickly
- Married three times before the age of 20
- Mother of Nat
- Wife of Jack

### Mingo

- Age 42
- Handsome—attractive to ladies
- Carpentry skills
- Teachable
- Has industrious habits

### Sukey

- Age 19
- Attractive mulatto (genetically half white and half black)
- Hard worker
- Sewing skills
- Loyal, faithful

### Sally

- Age 20
- Light skilled, flexible
- Sold at auction four times since age 3
- Appears feeble-minded and confused at times
- Pregnant

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# Identity and Allotment Slips

## Identity Small Farmer

Make up details about your life. Write your life details on the back of this slip. Describe the slave(s) you hope to purchase.

## Allotment \$600.00

## Identity Small Farmer

Make up details about your life. Write your life details on the back of this slip. Describe the slave(s) you hope to purchase.

## Allotment \$1000.00

## Identity Planter

Make up details about your life. Write your life details on the back of this slip. Describe the slave(s) you hope to purchase.

## Allotment \$1900.00

## Identity Planter

Make up details about your life. Write your life details on the back of this slip. Describe the slave(s) you hope to purchase.

## Allotment \$3500.00

## Identity Small Farmer

Make up details about your life. Write your life details on the back of this slip. Describe the slave(s) you hope to purchase.

## Allotment \$900.00

## Identity Planter

Make up details about your life. Write your life details on the back of this slip. Describe the slave(s) you hope to purchase.

## Allotment \$2000.00

## Identity Planter

Make up details about your life. Write your life details on the back of this slip. Describe the slave(s) you hope to purchase.

## Allotment \$2800.00

## Identity Planter

Make up details about your life. Write your life details on the back of this slip. Describe the slave(s) you hope to purchase.

## Allotment \$5000.00

# Auctioneer Profile

You are an auctioneer, chosen to guide the proceedings from start to finish. For your role, take one of these names: **Capt. Cobb Dorsey**, **Buford Kemp**, or **Ned Banks**. Divide the list of slaves to be auctioned with the other auctioneers, memorize their qualities, and use what you have learned about each to heighten the drama and excitement of each sale. Finally, be sure you **practice the rapid patter of an auctioneer**.

## Suggestions on how to play an auctioneer:

- Make sure the slaves are “manacled” or “chained” when they come in as a coffle (small group). Allow five minutes or so for buyers to inspect them. Insist on proper behavior and obedience from your slaves throughout the activity.
- Call slaves by their first (and only) names, or call them “boy” or “woman.” Make sure each slave has a name tag. (*Complete this task beforehand. You can make the name tags or have the slaves make their own.*)
- Remember that you work for a broker who wants top money for each slave. You will receive a nice commission for your success as an auctioneer.

- Start the auction with:

*“Ladies and gentlemen . . . Step forward and look at today’s merchandise—all young, likely slaves. They’re all fit as a fiddle! We here, who represent A. K. Dyer, brokers of slaves, guarantee it. But let’s give you buyers a few minutes to examine up close these slaves who may work on your plantations.”*

- After five minutes of buyer scrutiny, say: “Well, have you had time to examine these choice specimens—all of them eager to find new homes?”

**Acting Tip:** Be full of energy and emotion. You have to physically project yourself out over the prospective buyers.

- Like a real auctioneer, use a rapid-fire, staccato voice. Use a nimble tongue. Crack jokes and repeat familiar phrases. “Let’s start our sale today with . . .” (*Name a slave and a few qualities to entice the buyers. Use the slave profile sheets for details on each slave.*) “What do I hear for an opening bid?” (*Pause to hear a bid.*) “I hear fifty dollars, fifty dollars, fifty dollars. I have a bid for fifty dollars! Do I hear one hundred dollars?” Between bids continue to encourage higher bids by repeating the good qualities of each slave. To do this use the colorful phrases from Alex Haley’s *Roots*—and other sources.

**Acting Tip:** As you use phrases such as these, walk right up to the slave you're promoting and gesture dramatically so that you command the buyers' attention.

*"Can be trained to do anything"*

*"Top choice"*

*"Prime specimen"*

*"Top dollar on resale"*

*"Loves people"*

*"Recently arrived from Major Ashton's plantation"*

*"Can learn a trade"*

- Your goal is to get top dollar for each sale. Try to generate competition among the buyers. Exaggerate each slave's qualities if you need to.
- At the end of each sale, say: "Sold to . . . [buyer's name and farm or plantation.] Next we have . . ."
- At the auction's end, thank everyone and announce a date for the next slave sale, or guide the buyers to a sale down the street that starts in one hour.

# Slave Information Sheet

## Profile

You are a specimen—a piece of human property to be bought and sold at the whim of another human being who owns you or wishes to own you. Fate has made your skin black and placed you in the South in the mid-nineteenth century. Today's slave auction will typify the thousands of such events that occurred over the decades until the 1860s, when involuntary servitude was abolished in the United States. Your future after the sale is unclear. You can only hope you are bought by a civilized gentleman with a reasonable overseer.

**Acting Tip:** The quality of your role-playing is essential to this Activator's success. Keep your "cool" and play your part as accurately as you can. If you do, everyone in your class will learn a great deal about this degrading part of American history.

## Suggestions on how to play a slave:

- Play the character given to you accurately and with some drama. Try your best to dress the part!
- Do what the prospective buyers want you to do. Allow yourself to be examined.
- The auctioneers will dramatize your positive qualities, but they do not care about your fate. Remember to communicate to the buyers any special skills you possess that may place you near the master's house, instead of in the fields. Some slaves were proud of getting high bids and would talk about the auction for years.
- If you can communicate that you are particularly intelligent or have special skills that could place you as a house slave, be sure you figure out how to do so. House slaves worked more closely with their owners than did field slaves. They often received preferential treatment and knew much more about the farm or plantation. Incidentally, house slaves often found a way to learn to read and write; they usually knew more geography than field slaves knew. Consequently, they were the slaves who had the best chance to get to the North when they ran away.
- Realize that you are going to be humiliated and degraded while you are examined and sold on the auction block today. (You'll have opportunities during the debriefing to share your feelings with others in class who were not on the auction block.)
- Keep in mind that most slaves being sold went through examinations without protest and with apparent indifference. Rule number one was obedience and submission at all times. Penalties could be harsh.

# Buyer Profile

## Profile

You are a slave owner looking to buy slaves to work your small farm or large plantation. You need strong field hands, skilled house workers, and other slaves who will be loyal, stay healthy, and be docile. For you, buying slaves is a business transaction comparable to your buying grain, seed, a horse, or a plow. Make good choices. Think about strong and obedient workers at reasonable prices.

**Acting Tip:** Come prepared. Try to dress for your part if you possibly can. Be sure you have written some details about your life on the back of your **Identity and Allotment** slip. You will have to show this slip when you go to pay for any slave you wish to purchase. The slip explains how many dollars you can bid during the auction and pay afterward.

## What to do as a buyer of slaves:

- If there is a slave pen set up before the sale starts, use this opportunity to walk around and visually inspect slaves you might want to buy.
- Whenever you make an inspection before bidding, be sure to check the slave's arms and legs, as they will give you an indication of muscular development. Examine the hair for lice, look at the teeth, and scrutinize the eyes. Test the slaves' vision by asking them to describe what they see with each eye while they cover the other. Give slaves a hearing test.
- Focus on each slave's back for lash marks, welts, or nicks—sure signs of a rebellious nature and a potential runaway.
- Discern each slave's ability to work long hours as a house slave or as a field worker.
- Pose several questions to the slaves. Examples: Are you strong? Ever been whipped? Can you tend to children? How old are you? What can you do? Why are you being sold? Anything wrong with you?
- To demonstrate their physical agility and spirit, make the slaves jump up and down on one foot and do other physical exercises. Expect them to obey you.
- Give yourself a title like colonel, major, captain, judge—or simply "master." Let everyone know who you are. *Examples:* Colonel Charleton Oglesby of Briarwood Plantation or John Witherspoon, small farmer from the hill country.
- After you buy a slave or two, go to the cashier's box, write a bank draft or roll out cash dollars, and take your slave(s) to a place where they can sit on the ground near you until the auction is over.

# Postscript

Scenes of scared and angry slaves being sold on an auction block in Southern towns and cities were common for decades until the Civil War (1861–1865) ended the practice. During the war, slave auctions became infrequent with everyone focusing on the War for Southern independence. Sectional survival, not profiting from the sale of slaves, became more important.

With the Union victory at Appomattox Court House in April 1865, those released from bondage had considerable difficulty adjusting to their freedom. The federal government, in most cases, came to their aid. Congress passed the Thirteenth, Fourteenth, and Fifteenth Amendments. Once state legislatures ratified these so-called Civil War amendments, slavery was officially and legally abolished, blacks were made citizens, and black males could vote. Yet these mandates were virtually nullified by a series of state, county, and local ordinances that continued to segregate African Americans as second-class citizens.

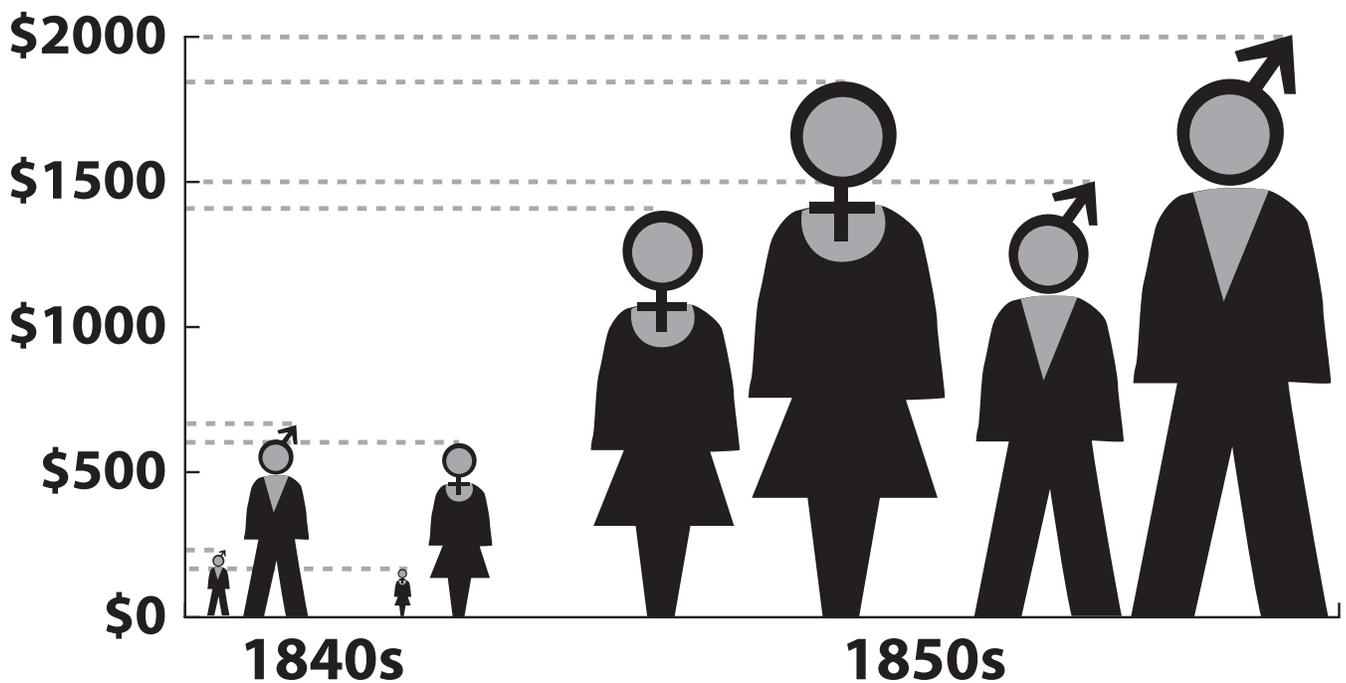
Along with these discriminatory “Jim Crow” laws and Black Codes, African Americans had to contend with the rise of powerful Southerners who wanted to restore white supremacy during the Reconstruction era (1865–1877) and after. By using violence and intimidation—and believing that blacks were still an inferior race useful only as dependent farmers and laborers—groups like the Ku Klux Klan spread their racial ideas throughout the South. Despite the KKK’s actions, there was some progress toward black equality and justice with a few advancements in education and politics. Nevertheless, in American society, blacks would not achieve equality during the nineteenth century.

The years that followed the Civil War and Reconstruction era illustrate the long, hard journey African Americans have endured. Small victories here and there came originally from legislatures and courts slow to react to changing times. Only with a key Supreme Court decision in the mid-1950s (*Brown v. Board of Education, Topeka, Kansas*) and civil rights protests of the 1950s and 1960s, making justice and equality a national priority, would the old myths about black inferiority begin to be dispelled. Have they achieved true acceptance as equals in today’s American society? That is a subject for debate. The fact remains that African Americans traveling the road to freedom since 1619 have a painful legacy during which they were owned like cattle, subjected to the lash, did forced labor for no pay, and experienced the degrading ordeal of the auction block.

# Slave Sale Economics

Current historical research indicates that the selling of slaves was usually profitable for those who called themselves professional slave traders. Even after paying auctioneers and employees to transport coffles of slaves, a competent broker could often realize a healthy profit of more than \$50,000 a year. Kenneth Stampp, in his classic work *The Peculiar Institution* (1956), writes about one trader who usually sold most of his merchandise for \$200 to \$300 more than what he paid, which at the time (1850) was a markup of 30 percent. These transactions netted him a profit of more than \$100 on each slave he sold.

In general, healthy male slaves sold for between \$250 to \$650 in the 1840s. In the late 1850s, prices rose to \$1500 to \$2000. A female usually brought less on the auction block. Prices varied on slaves with special skills or talents. Children of slaves had even less value until they were near adulthood. Slave families, incidentally, were rarely sold as a unit; buyers saw little advantage to keeping family members together. Interestingly, slaves who were dressed in coats, jackets, clean shirts, woolen pants, shoes and socks, and even turbans sold for higher prices.





# Historical Investigation Activity

## *Slave Auction (1854)*

By Bill Lacey

### Focus Question

Ex-slaves: What do their letters to their former masters tell us about slavery and plantation life?

### Materials Needed for This Historical Investigation

- **Documents A–C**—*class set*
- **Points to Ponder Response Sheet**—*class set*

### Lesson Plan

#### 1. Getting Started

- Say to students, “Most of you now know something about how slaves came over on the Middle Passage from Africa and how they were bought and sold on auction blocks. Most slaves who were sold spent the next several years toiling in the fields of generally wealthy plantation owners, or working as domestics in the plantation’s larger houses, some in close contact with the owner and his family. Yet for a slave—inside or outside—it was a life without freedom or choice.

“Suppose one of these field hands escaped and years later, from Canada, he wrote a letter to his former master, the man who controlled his life from dawn to dusk, and could mistreat or sell him to another owner. What do you think the ex-slave would write about?”

- Pass out the **Points to Ponder Response Sheet** and have students write down their answers to question #1.
- Allow five minutes and then discuss responses, perhaps writing down discussion points on the board. Then transition to the backstory.

#### 2. Backstory to Use as Instruction

- To generalize about slavery in the antebellum South is a historical challenge. What is certain is that slavery, along with race, remains a contentious topic. Blacks were treated on a daily basis as their owner’s property, to be worked ceaselessly and to be bought and sold as chattel. Some would say that today’s racism stems from this master-slave relationship.



- We do know that hundreds, perhaps thousands, attempted to escape from this “peculiar institution,” mostly on their own until they got to the North, using their own wits and survival skills. At a later point on their journey, many used the secretive Underground Railroad, a system of escape routes along trails, rivers, and streams. They were helped along the way by a cast of supportive “conductors” and “station agents”—like Indiana’s Levi Coffin—whose houses became temporary safe havens for these freedom seekers. After 1850, with the passage of the Fugitive Slave Act, freedom meant going all the way to Canada, since the new law made it illegal to hinder a slave-catcher “directly or indirectly” or to assist a slave to escape, or harbor a slave, with a severe penalty of up to \$1000 paid out to the slave’s owner.
  - The Underground Railroad, with its epic stories of high drama and extraordinarily brave individuals (Harriet Tubman and Sojourner Truth, most notably), had a profound impact on the pre-Civil War era, and on our imagination today. In effect, people of the Underground Railroad resisted repressive laws that held slaves in bondage—clear examples of civil disobedience before and during the protests of Henry David Thoreau and after the biggest example of all, the American Revolution. These hundreds of courageous citizens were engaged in the subversion of federal law, including the draconian Fugitive Slave Act, and thus, according to historian Fergus Bordewich, “asserted the principle of personal, active responsibility for others’ human rights.”
  - It’s hard to say how many slaves escaped, since almost no documents or evidence exist from this system that was mostly secret. Fortunately, the words of the slaves themselves who escaped and then wrote and spoke about their plantation lives and journeys out of the South have been preserved and documented in a massive collection. These interviews and narratives were preserved by the Federal Writers Project of the Works Progress Administration from 1936 to 1938. The WPA recorded the testimonies of over 2300 former slaves. This collection reveals firsthand the true nature and effects of slavery on those of African descent. Some historians, however, have questioned the reliability, authenticity, and objectivity of the collection since many of the narratives were used as abolitionist propaganda and several were ghostwritten or assisted by white abolitionist editors. Also, the narratives might reflect the thoughts of only the most gifted and talented ex-slaves, meaning they don’t represent the masses of “average” persons in bondage.
3. Say, “From our discussion about what you think an ex-slave might write in a letter to his former owner, we now have a few reference points before we examine the document package. What will the documents tell us? What can we conclude from three such letters?”

## Slave Auction: 1854

### Historical Investigation Activity



4. Pass out the package of **Documents A–C** and explain what students are to do.
5. Allow thirty to forty minutes for students (in pairs or trios) to read and analyze the package. Perhaps you or a student could read aloud the first document and discuss the gist of it, and as an aid, help students fill in the columns for **Document A** on the **Points to Ponder Response Sheet**. Remind students that they should analyze the documents carefully and that the documents are not in any sequence.

Name \_\_\_\_\_ Date: \_\_\_\_\_

# Points to Ponder Response Sheet

**Focus Question:** Ex-slaves: What do their letters to their former masters tell us about slavery and plantation life?

1. In a letter to his former master/owner, I think the ex-slave living in Canada would write about . . .

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2. **Documents A, B, and C:** Using the chart below, fill in the spaces for each column for all three documents, to compare and contrast what these former slaves wrote and what they remember about their lives while in bondage.

	Ex-slave's name	Letter sent to . . .	Probable items in letter from master ex-slave is addressing	When letter was written	Major points made in letter by ex-slave	Tone/attitude of ex-slave in letter
<b>Document A</b>						
<b>Document B</b>						
<b>Document C</b>						

3. Given that most slaves weren't literate, and learned to read and write later in life, how reliable do you think their memories would be about specific acts committed against them?

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4. What reasons would there be for a ghostwriter to help an ex-slave write a letter?

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5. Which document(s) indicates more cruel or brutal punishment toward the slave? Describe these acts.

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6. How would you describe the reaction by the slaves to the master's request to return to the plantations?

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7. Subtext (What's "Between the Lines")  
Why were the letters written?

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For whom were the letters written? (Was it written just for the master?)

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Reading closely: What tone or attitude of the writer can be detected? Why do you suppose this attitude was taken in letters of this kind?

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8. Do you think the writers of **Documents A, B, or C** exaggerated what they remembered? Which writer(s)? Give examples of exaggerations.

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9. Based on the documents you analyzed, write a long paragraph answering the **Focus Question** at the top of this sheet. Make at least three major points to substantiate your position.

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# Document A

## Henry Bibb's Letter to William Gatewood (March 23, 1844)

Henry Bibb, born a slave in Kentucky, probably fled over the Underground Railroad to Detroit, and, after the 1850 Fugitive Slave Act was passed, settled in Canada, where he became a persistent and energetic abolitionist and founded the first black newspaper in Canada.

Dear Sir:

I am happy to inform you that you are not mistaken in the man whom you sold as property, and received pay for as such. But I thank God that I am not property now, but am regarded as a man like yourself, and although I live far north, I am enjoying a comfortable living by my own industry. If you should ever chance to be traveling this way, and will call on me, I will use you better than you did me while you held me as a slave. Think not that I have any malice against you, for the cruel treatment which you inflicted on me while I was in your power. As it was the custom of your country, to treat your fellow men as you did me and my little family, I can freely forgive you.

I wish to be remembered in love to my aged mother, and friends; please tell her that if we should never meet again in this life, my prayer shall be to God that we may meet in Heaven, where parting shall be no more.

You wish to be remembered to King and Jack. I am pleased, sir, to inform you that they are both here . . . and doing well. They are both living in Canada West. They are now the owners of better farms than the men are who once owned them.

You may perhaps think hard of us for running away from slavery, but as to myself, I have but one apology to make for it, which is this: I have only to regret that I did not start at an earlier period. I might have been free long before I was. I think it is very probable that I should have been a toiling slave on your property today, if you had treated me differently.

To be compelled to stand by and see you whip and slash my wife without mercy, when I could afford her no protection, not even by offering myself to suffer the lash in her place, was more than I felt it to be the duty of a slave husband to endure, while the way was open to Canada. My infant child was also frequently flogged by Mrs. (William) Gatewood, for crying, until its skin was bruised literally purple. This kind of treatment was what drove me from home and family, to seek a better home for them. But I am willing to forget the past. I should be pleased to hear from you again, on the reception of this and should also be very happy to correspond with you often, if it should be agreeable to yourself. I subscribe myself a friend to the oppressed, and Liberty forever.

Source: Henry Bibb, Letter to William Gatewood (March 23, 1844), reprinted in Howard Zinn and Anthony Arnove, *Voices of a People's History of the United States* (New York: Seven Stories Press, 2004).

# Document B

## Jermain Loguen's Letter to Sarah Logue (March 28, 1860)

Jermain Loguen (1813–1872) was born a slave in Tennessee to a slave woman and his owner, David Logue. At twenty-one, he escaped over the Underground Railroad to upstate New York, where he became active as an abolitionist speaker and a Methodist minister. This letter was written in reply to his owner's wife, Sarah Logue, who demanded that he return, or pay a \$1000 debt for their loss of "property."

Mrs. Sarah Logue:

*Yours of the 20th of February is duly received, and I thank you for it. It is a long time since I heard from my poor old mother, and I am glad to know that she is yet alive, and, as you say, "as well as common." What that means, I don't know. I wish you had said more about her. . . .*

*You sold my brother and sister, Abe and Ann, and twelve acres of land, you say, because I ran away. Now you have the unutterable meanness to ask me to return and be your miserable chattel, or in lieu thereof, send you \$1000 to enable you to redeem the land, but not to redeem my poor brother and sister! If I were to send you money, it would be to get my brother and sister, and not that you should get land. You say you are a cripple, and doubtless you say it to stir my pity, for you knew I was susceptible in that direction. I do pity you from the bottom of my heart. Nevertheless, I am indignant beyond the power of words to express, that you should be so sunken and cruel as to tear the hearts I love so much all in pieces; that you should be willing to impale and crucify us all, out of compassion for your poor foot or leg. Wretched woman! Be it known to you that I value my freedom, to say nothing of my mother, brothers and sisters . . . more than all the lives of all the slaveholders and tyrants under heaven.*

*You say you have offers to buy me, and that you shall sell me if I do not send you \$1000, and in the same breath and almost in the same sentence, you say, "You know we raised you as we did our own children." Woman, did you raise your own children for the market? Did you raise them for the whipping-post? Did you raise them to be driven off, bound to a coffle [a group of slaves being driven to market] in chains? Where are my poor bleeding brothers and sisters? Can you tell? Who was it that sent them off into sugar and cotton fields, to be kicked and cuffed, and whipped, and to groan and die; and where no kin can hear their groans, or attend and sympathize at their dying bed, or follow in their funeral? Wretched woman! Do you say you did not do it? Then I reply, your husband did, and you approved the deed—and the very letter you sent me shows that your heart approves it all. Shame on you! . . .*

But you say I am a thief, because I took the old mare along with me. Have you got to learn that I had a better right to the old mare, as you call her, than Mannasseth Logue had to me? Is it a greater sin for me to steal his horse, than it was for him to rob my mother's cradle, and steal me? If he and you infer that I forfeit all my rights to you, shall not I infer that you forfeit all your rights to me? Have you got to learn that human rights are mutual and reciprocal, and if you take my liberty and life, you forfeit your own liberty and life? Before God and high heaven, is there a law for one man which is not a law for every other man?

. . . Did you think to terrify me by presenting the alternative to give my money to you, or give my body to slavery? Then let me say to you, that I meet the proposition with unutterable scorn and contempt. The proposition is an outrage and an insult. I will not budge one hair's breadth.

Source: Jermain Wesley Loguen, Letter to Sarah Logue (March 28, 1860) as reprinted in Howard Zinn and Anthony Arnove, *Voices of a People's History of the United States* (New York: Seven Stories Press, 2004).

# Document C

## Jourdon Anderson's Letter to Colonel P. H. Anderson (August 7, 1865)

This is the most famous letter sent from an ex-slave to his former master. Jourdon Anderson (1825–1907) was born on a Tennessee plantation and lived there until Union soldiers freed him as they occupied that region of the Confederacy. It is speculated that his owner at the time of liberation was a former playmate and perhaps their relationship was close enough for the more recent owner, the son, to ask Anderson to return to help run the plantation. The letter itself, some have noted, has a deadpan, absurdist, and satiric tone that has been compared to Mark Twain's.

*To My Old Master, Colonel P. H. Anderson, Big Spring, Tennessee*

*Sir: I got your letter, and was glad to find that you had not forgotten Jourdon, and that you wanted me to come back and live with you again, promising to do better for me than anybody else can. I have often felt uneasy about you. I thought the Yankees would have hung you long before this, for harboring Rebs they found at your house. . . . Although you shot at me twice before I left you, I did not want to hear of your being hurt, and am glad you are still living. It would do me good to go back to the dear old home again.*

*I want to know particularly what the good chance is you propose to give me. I am doing tolerably well here. I get twenty-five dollars a month, with victuals and clothing; have a comfortable home for Mandy—the folks call her Mrs. Anderson—and the children—Milly, Jane, and Grundy—go to school and are learning well. . . . We are kindly treated. Sometimes we overhear others saying, "Them colored people were slaves" down in Tennessee. The children feel hurt when they hear such remarks; but I tell them it was no disgrace in Tennessee to belong to Colonel Anderson. Many darkeys would have been proud, as I used to be, to call you master. Now if you will write and say what wages you will give me, I will be better able to decide whether it would be to my advantage to move back again.*

*As to my freedom, which you say I can have, there is nothing to be gained on that score, as I got my free papers in 1864. . . . Mandy says she would be afraid to go back without some proof that you were disposed to treat us justly and kindly; and we have concluded to test your sincerity by asking you to send us our wages for the time we served you. This will make us forget and forgive old scores, and rely on your justice and friendship in the future. I served you faithfully for thirty-two years, and Mandy twenty years. At twenty-five dollars a month for me, and two dollars a week for Mandy, our earnings would amount to eleven thousand six hundred and eighty dollars. Add to this the interest for the time our wages have been kept back, and deduct what you paid for our clothing, and three doctor's visits to me, and pulling a tooth for Mandy, and the balance will show what we are in justice entitled to. Please send the money by Adam's Express, in care of V. Winters, Esq., Dayton, Ohio. If you fail to pay us for faithful labors in the past, we can have little faith in your promises in the future. We trust the good Maker has opened your eyes to the wrongs*

*which you and your fathers have done to me and my fathers, in making us toil for you for generations without recompense. . . . Surely there will be a day of reckoning for those who defraud the laborer of his hire. . . .*

*Say howdy to George Carter, and thank him for taking the pistol from you when you were shooting at me.*

*From your old servant,*

*Jourdon Anderson*

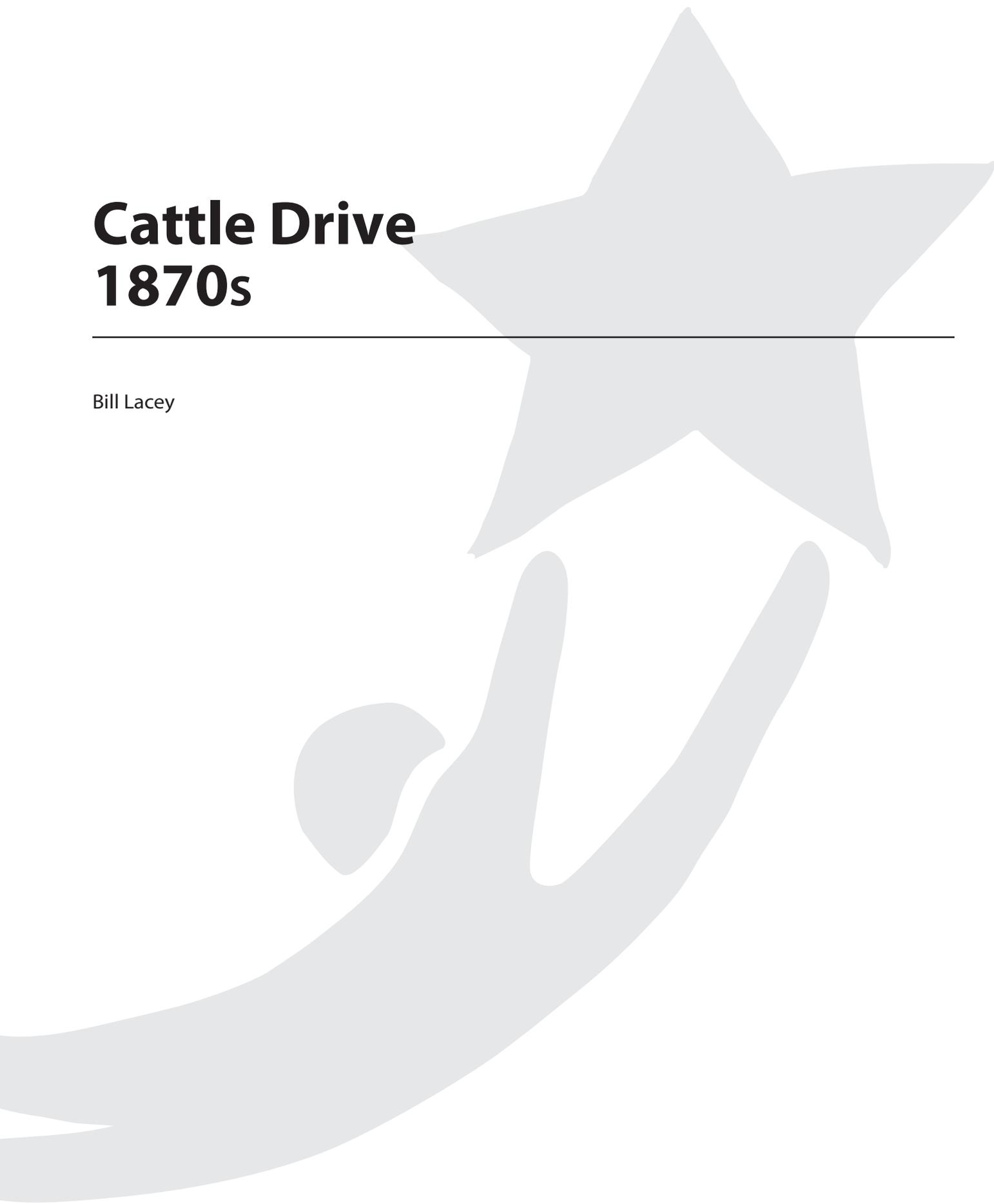
Source: Jourdon Anderson, Letter to P. H. Anderson (August 7, 1865) as reprinted in Lydia Maria Francis Child, *The Freedmen's Book* (Boston: Ticknor and Fields, 1866).



# Cattle Drive 1870s

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Bill Lacey



# Lesson Plan

## Overview

This Activator will place your students on a western cattle drive from Texas to Kansas. They will be cowboys forming a cattle company, then rounding up the animals into a herd, and driving their livestock about seven hundred miles to the railhead in Kansas. There, they will sell their cattle to buyers, who will transport the cows to eastern slaughterhouses. As cowboys, they will learn why these romantic and legendary frontiersmen have had such a grip on our imagination. Further, they will, as they simulate the cowboy's unique skills, understand the realities of a dirty, thankless, and difficult job that was so unlike the romantic myths perpetuated in novels and movies.

## Setup

### 1. Duplication

- **Background Essay**—*class set*
- **Postscript**—*class set*
- **Cowboy Names**—*two or three* per group plus a couple of copies to post on the wall prior to the Activator's beginning
- **Rules of The Trail, Sample Brands, and Cattle Company Register and Profit Sheet**—*one copy* for each cattle company
- **Cattle Buyer**—*one copy* for the student who is selected for this role

2. **Schematics, props, costumes:** Study the **Schematic** carefully. Find and bring into your classroom any props or costume pieces that will help create the setting of a Texas ranch and a dusty cattle trail to Kansas. (Perhaps students could help by bringing in cowboy hats, boots, vests, branding irons, etc.) See your school custodian and ask for six or seven push brooms to move cattle up the Chisholm Trail. Finally, gather paper due for recycling that your students can tear and squeeze into balls for "cattle" that will travel the Chisholm Trail.
3. **Roles:** Once students are divided up into cattle companies (five or six groups of seven students each), have each group select one trail boss, two swing riders, two flank riders, and two "young men" as drag riders. (Of course, if you have a small class, you will have only one student for each role.) Stress to your companies that their trail boss should be a John Wayne type with the most leadership qualities. The students riding drag should be the youngest in each company. (Groups should check birth dates to be fair.)

### Teaching tip

Names are important to your students.



They will enjoy selecting their cowboy names. These names will really add to the Activator's overall success.

### Teaching tip

Pilot testing the drive phase of



this Activator revealed that using regular and handheld whisk brooms worked better than the larger push brooms. If you decide to follow this recommendation, seek help from students so that several can bring brooms (six or seven) to school for your cattle drive.

### Teaching tip

Select drag riders, the youngest riders on the trail, by checking birth dates of all company personnel.



4. **Narrator(s):** In this particular Activator there is no narrator. The phases involve the group in active learning with your guidance.

## Directions

1. Either hand out the **Background Essay** as homework the day before class or pass it out now. If you have given it as homework, conduct an informal discussion of the main points brought out in the essay. If you are passing it out now, read the essay aloud to the students as they read with you, pausing to explain the main points.
2. Display the **Cattle Company Register and Profit Sheet**, explain it, and then divide the class into cattle company groups of six or seven each. Cattle companies next select their trail bosses, who will then fill the other needed roles of cowboys riding swing, flank, and drag on the drive. Move furniture to accommodate groups.
3. When the cowboys are in their groups ready for **Phase 1: Organization**, pass out to each company a **Sample Brands** sheet and a **Cattle Company Register and Profit Sheet**. Have each company spend some time choosing a company name and an appropriately clever brand. Stress that the **Sample Brands** Sheet is only samples to examine. Encourage each company to be unique and to come up with its own brand reflecting the company name. Point out that the brand should be difficult for rustlers to alter. (One technique rustlers loved was superimposing another brand on top of the original brand.)
4. Pass out the **Cowboy Names** sheet and have students adopt new identities.
5. Once all companies have named their business, devised a clever brand, and listed their real and cowboy identities on their **Company Register and Profit Sheet**, rearrange the room for **Phase 2: The Roundup**. In this phase, students roll up pieces of old newspaper (cut appropriately 10" × 10") or used notebook paper in fairly tight balls. Then, from six to eight feet away, they toss the paper balls into a circle about three feet wide until they have at least eighty separate balls within the circle. (They may have fellow cowboys in their companies remove the "cows" periodically from the circle to make room for additional ones.) To facilitate the roundup, either impose a time limit of ten minutes or end the roundup when one company has tossed a hundred paper balls inside the circle. The remaining companies, not as efficient in "lassoing" cows, will start their long drives in **Phase 3** with less than a hundred cows. After completing the roundup, have trail bosses write in the number of cows rounded up (× 30) in the space on their **Company Register and Profit Sheet**. Once this has been done, you and the eager cowpunchers are ready for **Phase 3: The Long Drive**.



### Teaching tip Possible pep talk before the cattle

**drive begins:** "On this drive we move cows. We don't gamble, we don't swear, and we don't use our guns unless it's absolutely necessary. **Leave your pistols in their holsters.** All right, men, let's move 'em north to Abilene. **Yee-hah!**"



### Teaching tip

#### Roundup:

During first pilot testing, six circles were chalked with three-foot diameters. On a second testing a thirty-six-inch Hula-Hoop was used. Both techniques work well. The roundup took three to four minutes for companies to "corral and brand" a hundred head of "cattle" and then to gather them into a box.

## Cattle Drive: 1870s

### Lesson Plan

#### Teaching tip

The rough asphalt and linoleum hallway used in pilot testing resulted in stray “cattle” going everywhere, requiring cowboys to work hard.



#### Teaching tip

A cowboy-style card draw by each of the five or six trail bosses could determine herd order on the trail.



You can take cattle from cowboys who violate rules.

#### Teaching tip

While Cattle Drive was being pilot tested, students went a distance of seventy-five to eighty-five feet in five to seven minutes with four river crossings, two rustling incidents during “nighttime” stops, and one Indian toll request.



**Note:** Use one blue rolled-up paper ball, which must go through a six-inch opening at each river crossing first.

6. Before beginning **Phase 3**'s long drive, make sure you have found and secured a hallway, corridor, or dusty athletic field along which the “cattle” will be moved/swept the distance of the drive. Seventy-five to eighty-five feet will likely be long enough to require five to seven minutes for each drive, which includes seven river crossings, two rustling incidents, and one toll payoff to Indians.
7. Another pre-drive task for you is to have the trail bosses draw a numbered slip of paper to determine their order to start up the Chisholm Trail. (Make sequentially numbered slips equal to the number of cattle companies going on the trail. Tell your class the first company to arrive in Abilene may or may not get the highest price per head).
8. Hand out to each company a **Rules of the Trail** sheet. The trail boss should read it aloud to company cowboys to ensure their understanding.
9. Go over the most important of the **Rules of the Trail** just before the first company is sent off with the “firing of a pistol” (or the slamming of a book on a table top) and the “**Yeee-hah!**” shouts of all students—and you—at once.
10. Appoint two students from other companies to be the rustlers who will throw Frisbees from ten to twelve feet along the sides of the trail and one or two others to be Native Americans (Chickasaw) demanding a toll fee for trespassing through Indian lands.
11. Let the first cattle company assume positions of point man (trail boss), swing, flank, and drag—with their brooms in hand. Now “fire the pistol” to start the first drive. Walk along the trail and watch for infractions in order to assess cattle losses. Make sure students adhere to the rules set down on **Rules of the Trail**.
12. When the first company finishes, return the brooms to the next company whose members are waiting to start while the first cattle company negotiates a price with the cattle buyer in Abilene.
13. Continue the process until all cattle companies have driven the trail, assessed losses, and sold their steers in Abilene.

You have a few different ways you can conduct this Activator:

**Option A** is what is outlined above—several cattle companies drive cows over the trail to Kansas one at a time.

**Option B** involves having one large cattle drive with all students driving their cows at the same time. In this option, all the cattle companies will pool all their rounded-up cows with different distinctive brands and sweep them all up the trail. Option B could be a massive undertaking, with twenty or so brooms sweeping away. If you use this option you could assign some students—not on the drive—to be rustlers. A few more could be buyers in Abilene.

**Option C** is a somewhat different option. Have some literary students utilize data from the handouts to write a narration for one select cattle company of six or seven to go up the trail. The remainder of the class could be sideline spectators, rustlers, Chickasaw Indians, and Abilene cattle buyers.

## Debriefing

Decide whether you wish to use a short or long debriefing. Here are possible ways to make meaningful what happened before, during, and after a Texas to Kansas cattle drive in the 1870s:

### Short Debriefing

1. Pass out the **Postscript**. Either read this to your students or summarize the main points of each paragraph before going on.
2. Ask students to discuss what they learned and what they felt as they played out the different phases of the cattle drive.
3. Consider having students write a Learning Log entry following the short debriefing.

### Long Debriefing

Use one or more of the following debriefing activities:

1. Pass out the **Postscript**. Either read this to your students or summarize the main points of each paragraph before going on.
2. Have students individually create a two-column ledger and fill it in with the myths and realities of a cowboy's life. They can share ideas within their debriefing groups. To get them started, make a format model on the board.

Cowboy Life	
Myths	• Involved in frequent shootouts
Realities	• Rarely fired his rusty pistol



#### Teaching tip

Following reading of the **Postscript**,

ask students this question: **“What does cowboy food tell you about these men?”**

S.O.B. Stew

Red Bean Pie

Sourdough Biscuits

Vinegar Cobbler

Coffee

Coffee

Coffee

## Cattle Drive: 1870s

### Lesson Plan

#### Teaching tip



An intriguing activity to use during the long debriefing would be showing filmed interviews on the trail of one or more of your “cowboys”

- after branding;
- after a river crossing;
- after a stampede; and
- while the herd was being moved up a ramp onto a St. Louis or Chicago cattle train.

#### Teaching tip



You may wish to write a chart such as this on your whiteboard before the debriefing.

3. Play some country and western songs that might reflect the lifestyle and/or values of a cowboy. *Example:* Willie Nelson’s “Mammas Don’t Let Your Babies Grow Up to Be Cowboys.” Then have some talented students compose and perform a cowboy song.
4. Show some paintings by Frederic Remington and Charles Russell. Help your students analyze the art in terms of how accurately they portray real cowboy life during the late nineteenth century.
5. Show photos taken by Erwin E. Smith in the late 1800s and early 1900s. Compare the photos with the works of Remington and Russell.
6. Show “The Longhorns,” an episode of James Michener’s miniseries *Centennial* from 1978. Starring Dennis Weaver as trail boss R. J. Poteet, it dramatizes what could happen on the Goodnight–Loving Trail in this era. *The Real West*, narrated by Gary Cooper, is a shorter film option; it has ten to twelve minutes on cowboys and cattle drives.
7. Cowboy lingo widely used on cattle drives and ranches for decades has found its way into our modern American language. Challenge students to come up with approximate translations (see *The Cowboy Dictionary* in **Resources to consult**):

Word/Phrase	Translation
Ace in the hole	
Keep an eye peeled	
Low-down heel	
Horsing around	
Trot that by again	
Small fry	
Lone wolf	
Haywire	
That’s a cinch	
Irons in the fire	
Pass the buck	
Whingding	
Shindig	
<b>Less Common</b>	
Pecos strawberries	Beans
Overland trout	Fried bacon
Belly cheater	A cook on the trail
Prairie coal	Dried buffalo/cattle manure used as wood
Bug juice	Hard liquor
Pearl diver	Dish washer

8. As alluded to in the **Background Essay**, cowboy poetry has become an important genre, especially since the mid-1980s, when poets of the purple sage met in Elko, Nevada, to test their verses on fellow cowhands. Each year since their first meeting, these poets and their work have gained more recognition and status. *People, Life, Newsweek, The New York Times, The Tonight Show, Good Morning America*, and PBS have all carried stories about cowboy poetry. Cowboy poets such as Colen Sweeten, Wallace McRae, Baxter Black, and Waddie Mitchell have become celebrities. After you've located a book or two on the subject, have students select some favorites and dramatically read them. Recommended: Baxter Black's *Coyote Cowboy Poetry* and Wallace McRae's *Cowboy Curmudgeon and Other Poems*.
9. Movie cowboy Gene Autry wrote his *Cowboy Code* in 1951 for youth of this author's generation. Have students comment on each rule in the code and why the early 1950s, in particular, had celebrities support a "Sunday school morality." Also discuss what real cowboys of the 1870s might have thought about Mr. Autry's code:
- The cowboy must never shoot first, hit a smaller man, or take unfair advantage
  - He must never go back on his word, or a trust confided in him
  - He must always tells the truth
  - He must be gentle with children, the elderly, and animals
  - He must not advocate or possess racially or religiously intolerant ideas
  - He must help people in distress
  - He must be a good worker
  - He must keep himself clean in thought, speech, action, and personal habits
  - He must respect women, parents, and his nation's laws
  - The cowboy is a patriot

**Teaching tip**

To begin this debriefing, reread the poem in the **Background Essay**. Consider having students write their own cowboy poetry on one day and share it on the next day.

**Teaching tip**

You may wish to write this on your whiteboard before the debriefing.

**Teaching tip**

Note how the student was helped with writing the Learning Log by the debriefing discussion.



Students will usually write more concrete details if they have reflected upon ideas and experiences they have discussed with their peers—before they pick up their pens to write.

- 10. To really complete your cowboys' education, why not teach them how to rope. (See Mason's book on roping in **Resources to consult.**)
- 11. Consider having students write a Learning Log entry following the debriefing's various activities.

### Write a Learning Log ...

Learning Log	
●	I rode drag for the Windy X Cattle Company because I was the youngest one in our group. Several times Billy swept dust back into my face from dry spots where no grass was living on the football field—I mean the Chisholm Trail. At first sweeping those cattle along seemed stupid. Why was Ms. Fairfax having us do this silly thing? I kept wondering. But once we discussed it in our debriefing, I began to get it. It was really difficult to keep those paper balls (the cattle) on line. And we did face problems with Indians and rustlers. The important thing is that I'll remember this experience ...
●	

### Resources to consult

#### Nonfiction

Abbott, E. C. "Teddy Blue," and Helena Huntington Smith. *We Pointed Them North: Recollections of a Cowpuncher*. Norman: University of Oklahoma Press, 1939.

Adams, Andy. *The Log of a Cowboy: A Narrative of the Old Trail Days*. Boston: Houghton Mifflin, 1903.

Adams, Ramon F. *The Cowboy Dictionary: The Chin Jaw Words and Whing-Ding Ways of the American West*. New York: Perigee, 1968.

Dary, David. *Cowboy Culture: A Saga of Five Centuries*. Lawrence: University Press of Kansas, 1981.

———. *Seeking Pleasure in the Old West*. Lawrence: University Press of Kansas, 1995. (Especially chapter 7.)

Davis, William C. *The American Frontier: Pioneers, Settlers, and Cowboys, 1800–1899*. London: Salamander, 1992.

Forbis, William H. *The Cowboys*. Old West Time-Life Series. New York: Time-Life Books, 1977.

Mason, Bernard S. *Roping*. New York: A. S. Barnes, 1940.

Moore, Jacqueline M. *Cow Boys and Cattle Men: Class and Masculinities on the Texas Frontier, 1865–1900*. New York: New York University Press, 2010.

Stern, Jane, and Michael Stern. *Way out West*. New York: HarperCollins, 1993. A fascinating compendium of cowboy nostalgia: food, costumes, memorabilia, and long-gone roadside attractions.

Ward, Don. *Cowboys and Cattle Country*. New York: American Heritage, 1961.

### Fiction

Novels about cowboys abound and have since the Ned Buntline dime novels in the 1865–1890 era. Recommended for student reading are the works of Zane Grey and Louis L'Amour, Jack Schaefer's *Monte Walsh*, and (this author's all-time favorite novel) Larry McMurtry's *Lonesome Dove*, an absolutely stunning work about a cattle drive from Texas to Montana.

### Visual history

**Feature films:** Like cowboy literature, cowboy movies and TV miniseries have been plentiful. Of the hundreds on film, these are recommended: *Lonesome Dove* (the 1989 six-hour miniseries), *Red River* (John Wayne and Montgomery Clift in the 1948 John Ford classic), "The Longhorns" (starring Dennis Weaver as trail boss R. J. Poteet in a two-hour episode of James Michener's *Centennial* miniseries from 1978), *Cowboy* (a well-made 1958 movie with Glenn Ford and Jack Lemmon), *The Cowboys* (John Wayne leading a pack of young cowboys on a drive), and the author's favorite cowboy flick, *Monte Walsh*, a 1970 movie starring Lee Marvin and Jack Palance, about the last years of the cowboys' heyday (remade in 2003). For a cattle drive comedy, see Billy Crystal's *City Slickers* (1992).

**Documentaries:** *Adventures of the Old West*, from the mid-1990s, has an episode entitled "Texas Cowboys and the Trail Drives" narrated by Kris Kristofferson; it parallels the subjects in this Activator. If you have only a little time to show a segment on cowboys, show "The Real West," from the *Project XX* series originally broadcast in 1960 and narrated by Gary Cooper. The segment on the cattlemen is well done and brief (ten to twelve minutes).



#### Teaching tip

In James Michener's miniseries

*Centennial*, the Dennis Weaver characterization of R. J. Poteet and the accompanying story line are both marvelous. Your students would really enjoy seeing this episode.

# Background Essay

**Place:** Near San Antonio, Texas, and on the trail toward Abilene, Kansas

**Time:** Spring, the 1870s

## The Throw-Back

'Twas the end of the nineteenth century  
 When the cowboy era peak'd,  
 An' a motley clan of horse-back men  
 Perfected a technique,  
 Of handlin' an' movin' cattle  
 A type raised primarily for meat,  
 Thus insurin' a hungry young nation  
 There would always be plenty to eat.

The words above raise two points relevant to this Activator. One, the poem mentions the economic and nutritional importance of the cattle industry and its employees to America (supplying beef to the populous eastern cities). Two, it illustrates the current popularity of the cowboy poetry genre. This poem and thousands like it hark back to the 1865–1890 era, when the frontier was coming to an end. These years saw the economic development of the Great Plains grasslands and the evolution of several hundred individuals called cowboys. These men, who spent years raising cattle on vast ranches and then driving them to market, left a colorful legacy.

## Texas origins

The animal that became the center of this industry, the bovine, came to the Americas from Spain. Eventually, New Spain became Mexico and the vast herds of longhorn cattle that came from the original herd settled in the province called Tejas, or Texas. Restless Americans emigrated to Texas, fought Mexico for independence, and then joined the Union in 1845. After the Civil War, a few entrepreneurs saw the opportunity to earn huge profits if they could supply an abundant

amount of beef to a meat-hungry population east of the Mississippi River. After all, four-legged creatures outnumbered their two-legged masters nine to one in Texas.

## Joseph McCoy

One such visionary was Joseph McCoy, who effectively brought together the Texas herds of longhorn cattle, the long drive to Kansas, and the railroads to ship the animals to Chicago for slaughter. Although there were earlier visionaries and earlier cattle drives in the West (e.g., California to Oregon, and over the Oregon Trail), McCoy conceived the idea of a rendezvous point where animals could be driven to the railroad out on the Kansas plains. His choice for the first cow town was Abilene, along the Kansas-Pacific railroad.

## Roundup time

Now with an ingenious plan and a profit incentive, Texans began efforts to gather together personnel to drive the longhorns the seven hundred miles to market: a trail boss, a cook, and several cowpunchers (*cowboys*, *cowhands*, and *waddies* are words used synonymously). Before the journey over a trail charted by Jesse Chisholm could begin, the cattle had to be rounded up, branded, and readied for the trip north. As colorful as the long drive it preceded, the roundup took place each spring and fall when cowboys located the “maverick” animals that had wandered, identified them, and then branded the newborn calves with a hot iron. These brands, universally used in Texas and later on in the Wyoming and Montana ranches where the industry eventually settled, were highly distinctive and served to recover stolen cattle. Skilled cowboys rode swift and maneuverable cow ponies to “cut out” animals

Poem Source: “The Throw-Back” by Waddie Mitchell from Cannon, Hal, ed. *Cowboy Poetry: A Gathering*. Salt Lake City: Peregrine Smith, 1985.

needing branding from the rest of the herd. Once branded, cattle had a permanent scar to mark their ownership.

### **Mexican flavor**

During the roundups and on the drives themselves, especially the ones originating from Texas, the new industry distinctively blended American and Spanish-Mexican cultures. Examples of the blend abound in the unique lingo used by cowboys. A rope, used to lasso cattle and horses, was a *lariat*. A cowpen was a *corral*. The Mexican word for cowboy, *vaquero*, became *buckaroo*. A runaway herd was a *stampede* (from *estampida*). Cowboys rode horses called *mustangs* or *broncos*, both of Spanish origin. Most cowboys wore *chaps* (from *chaparreras*) for protection against thorny bushes. A *remuda* of horses awaited as replacements for tired cow ponies.

Of the hundreds of cowboys who gloried in the name, if not the actual job, one-third or more were Hispanic and African American. Lists of company personnel are peppered with names such as “Mexican” Joe Herrera and Nat Love, reflecting the diversity of this unique fraternity.

### **The cowboy**

The hardy individuals called cowboys who moved cattle over trails to railheads for thirty dollars a month were mostly young men. (Anyone over the age of thirty was an “old man.”) For some reason, the hard, dirty, and frequently dangerous job the cowboys did has evolved into a romantic myth. Nothing could be further from the truth. Long hours on horseback under a blazing sun attending one of nature’s wild creatures was no picnic. Even a cowboy’s outfit, romanticized in countless movies and TV shows, was more practical than fashionable. Just about every stitch had a purpose. The wrangler’s most prized possession, beyond his cow pony, was a wide-brimmed hat. It was used as a sun shade,

a drinking cup for man and beast, and a fan to fan a campfire. His boots, so imitated today, provided needed traction while roping cattle and protected ankles against snake bites. A six-shooter, usually unused and perhaps rusty, was at his side just in case it was needed to turn a stampeding herd, to kill a rattlesnake or two, or, on really rare occasions, to thwart rustlers and Indians. Each article of clothing had its function, even a simple large bandanna—to protect the face against dust or to mop away sweat. Despite his practical appearance and the fact that he ate a monotonous diet of beans, biscuits, bacon, and coffee, the cowboy exuded a romantic image that has remained intact. In the end, he was, whatever else we think, a mover of cows and a man who rarely complained in any situation, no matter how difficult.

### **On the trail**

Romantic costume aside, the cowboy’s real job remained moving cattle. Each day was filled with long hours and dust, to say little of numbing routine and often sudden temperature changes. The major trails north out of Texas took about two months to traverse. A trail boss supervised the herd (average size—2500) and the twelve to fifteen men who rode along. The drive’s cook (“cookie”), a most valuable employee if he had the skill to make a boring cuisine tasty, rode ahead in a chuck wagon, stopping an hour or so early to prepare meals. Certain cowboys rode *drag*—the position behind the herd where they kept cattle from straying—and continually breathed dust and manure; they were young greenhorns, usually teenagers, who had no trail experience or influence. By contrast, certain honored cowpokes rode *point* at the front of the herd; they were experienced, dependable riders who ate no dust and acted as scouts watching for trouble and deciding exactly where to lead the herd.

An arresting visual sight on a cattle drive was the emergence of one of the “cows” that aggressively walked out ahead of the herd on the first day. This animal then guided the rest of the herd north for the entire journey. One such memorable creature was Old Blue, who spearheaded several drives over the years.

### **Problems**

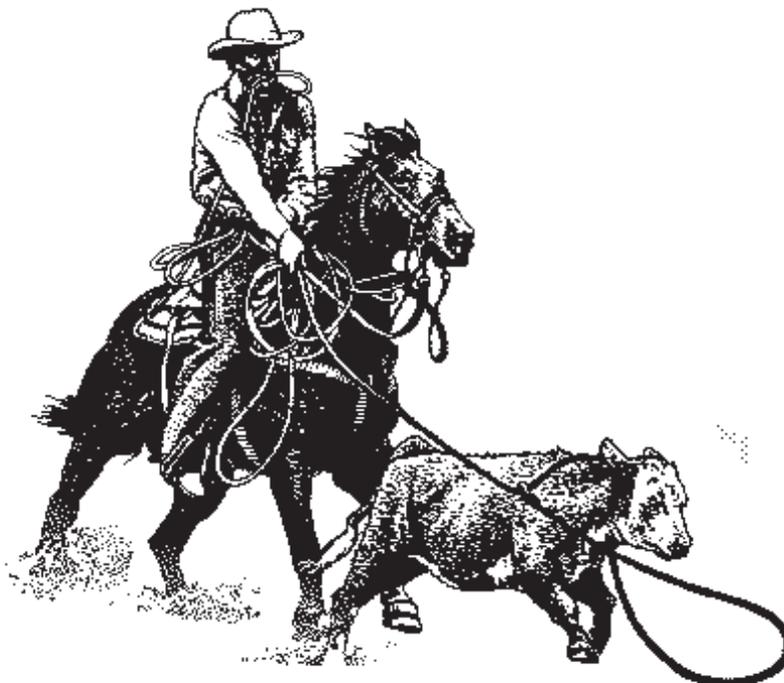
As ordinary and unenviable as life on the trail usually was, the job of punching and moving cattle was beset with problems and dangers. Swollen, deep rivers—especially the Red River—complicated the task of fording thousands of cows across the water often filled with deadly water moccasin snakes. Torrential rainstorms with clapping thunder could stampede a herd and set a pattern of “spooking” the animals throughout the trip. Sometimes a mere clang of the cook’s pans would set them off. Cattle rustlers and defiant farmers or Indians often demanded a per-head toll across their lands, thus increasing the difficulties of a journey already fraught with physical dangers and other vexations. Traversing

the baked land of the Llano Estacado (along the Goodnight-Loving Trail to Colorado) could also result in a reduction of the herd. All these obstacles had to be overcome before arriving at the Kansas railhead, where, in eventual business transactions, the price per head might fluctuate enough to generate less profit for the investors.

A “mixed herd” consisted of bulls, cows, and cattle or steers (castrated bulls).

### **Point ‘em north**

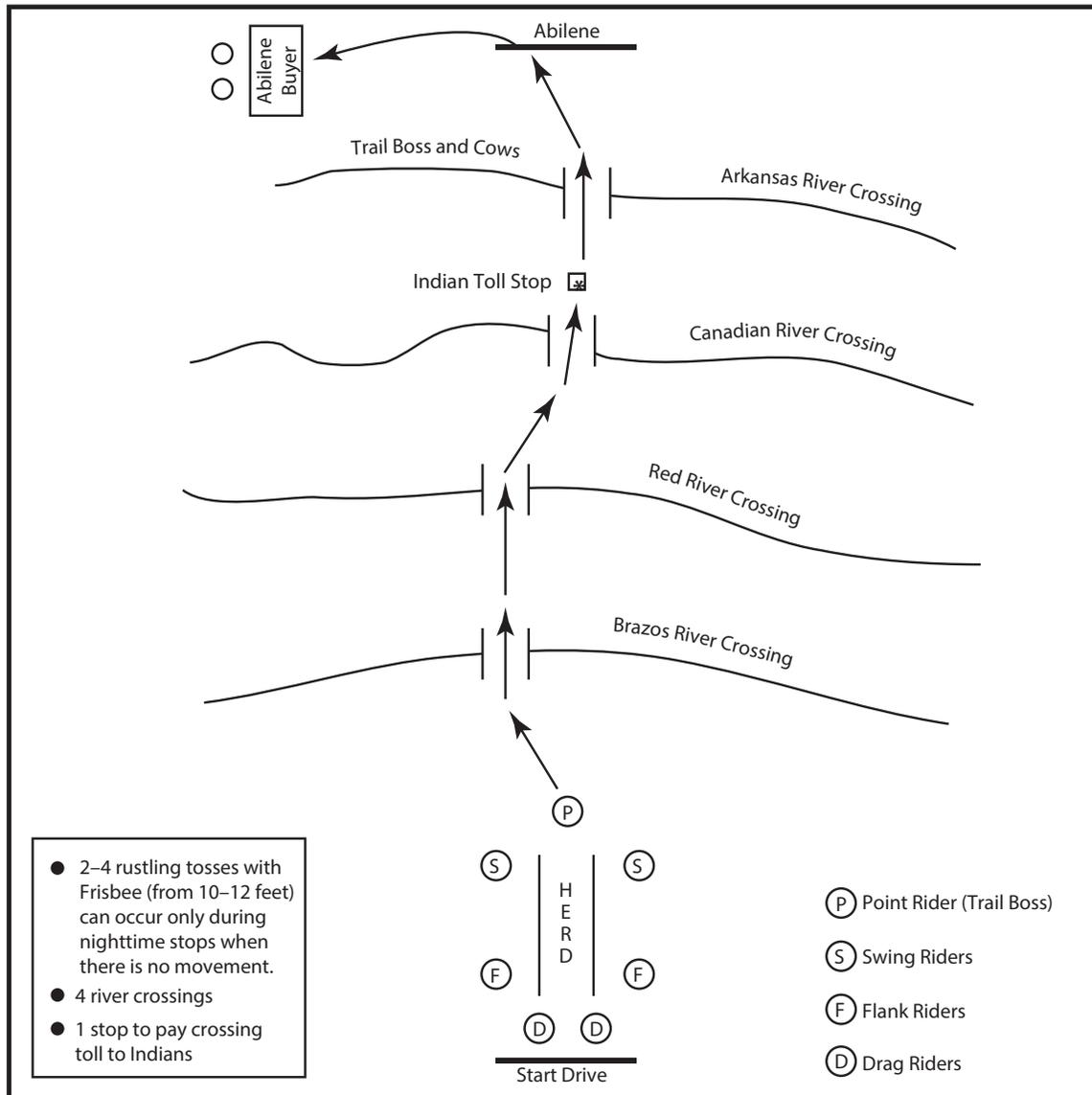
What you have read above is the way it was for a decade or two when men drove cattle to railroad towns to sell beef on the hoof. Now it is time for you and your classmates to simulate some phases of cowboy life. So, put on your boots, hop up onto the “hurricane deck” of your cow pony, and get ready to create a cattle company with its unique brand, take an authentic cowboy name, roundup a mixed herd, and move ‘em north along the old Chisholm Trail. Buyers await to pay cash money for the beeves you have driven to market. **“Get along, little doggies, yee-hah!”**



# Schematic

**Phase I:** If possible, find a space outside the classroom and draw a circle, thirty-six inches in diameter, for each cattle company to perform its roundup. Cowboys toss paper balls until one company has a hundred inside the circle.

**Phase II:** Find an area large enough to accommodate the Activator (thirty to fifty yards or half a football field).



## Suggestions

- Utilize a space long enough to accommodate a five- to seven-minute cattle drive.
- Other companies walk along sides of the trail, with rustlers among them hiding their Frisbees.
- The river crossings require all cattle to “ford” through two to four bricks set six inches apart.

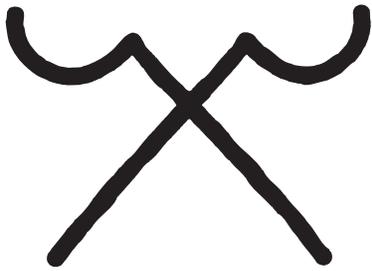
## Characters needed

- In each group: trail boss, swing riders (2), flank riders (2), drag riders (2)
- Abilene cattle buyer
- 2–4 rustlers (with Frisbees)

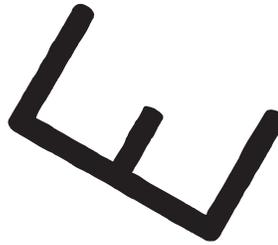
# Cowboy Names

Teddy Abbott	Roy Griffin	Bud Miller
Wash Adams	J. L. Grissom	Perry Owens
George Arnett	Pablo de la Guerra	Felipé Padilla
Pedro Baca	Roberto Guzman	Juan Pardo
Thornt Biggs	J. C. Henry	Pico Perez
Old Sid Bowen	"Mexican" Joe Herrera	Jim Perry
Kit Carter	Tim Hersey	Bill Pickett
"Bronco" Jim Cassidy	Ben Hodges	Abel "Shanghai" Pierce
"One-Horse" Charley	Bronco Jim	Ike Pryor
Alonso Chavez	Emmanuel Jones	J. D. Reed
John Chisum	George Jones	Lasso Bill Sears
Newt Clendenen	Russ Jones	José Solano
Juan Cortina	Mifflin Kennedy	John Sparks
Jack Davis	Bill Keyes	Joe Tasby
Marco Diaz	Bob Leavitt	Estévan Torrejon
Ed Eaton	Manuel Lopez	Gabriel Vallejo
Charlie Ferris	Nat Love	Dutch Van Horn
Tom Fisk	Oliver Loving	Monte Walsh
John Fitch	Seth Mabry	Albert Welhouse
Baylis Fletcher	Murdo MacKenzie	Al Wise
W. D. Gaton	J. A. Mars	Uncle Dick Wootton
George Glenn	Rufus McCaleb	
Nacho Gomez	Butch McCoy	

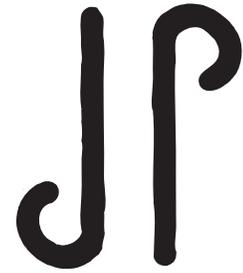
# Sample Brands



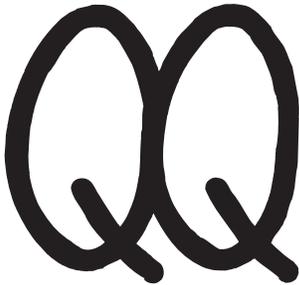
**Flying X**



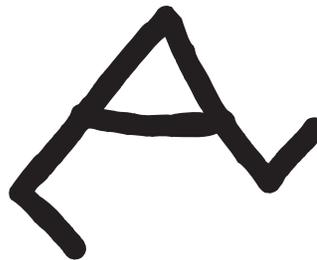
**Tumbling E**



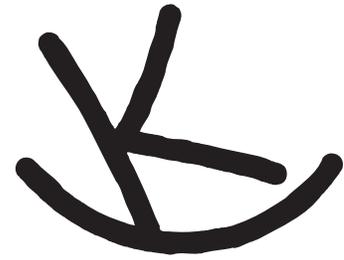
**J Up J Down**



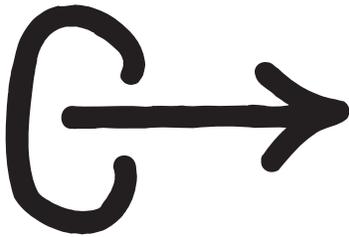
**Double Q**



**Walking A**



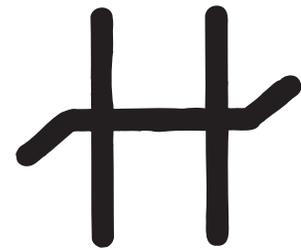
**Rocking K**



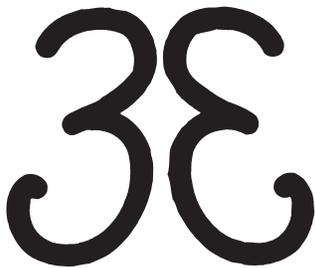
**C Arrow**



**Lazy S**



**Broken H**



**Three To Three**



**Swinging 4**



**Crazy 5**

# Cattle Company Register and Profit Sheet

Company Name: \_\_\_\_\_

Company Brand

## Company Personnel

Position	Real Name	Cowboy Name
Trail Boss (Point Rider)		
Swing Riders		
Flank Riders		
Drag Riders		

(Circle your year.)

**First on Trial** ..... **1871**

**Second** ..... **1872**

**Third** ..... **1873**

**Fourth** ..... **1874**

**Fifth** ..... **1875**

**Sixth** ..... **1876**

**Seventh** ..... **1877**

**SALARIES:** For a 2-month drive, pay these wages: 10 cowboys, \$80 each; trail bosses, \$250; cook, \$100; wrangler (in charge of extra horses), \$50.00.

Total wages = \$1200

Ⓐ # of cattle after round-up (paper balls)

\*(Historical Adjustment)  $\times 30$  \*

Total # cattle starting drive

Ⓑ Purchase price...  $\times \$4.00$

(per head from Texas rancher)

Ⓒ

# of cattle at end of drive (paper balls)

$\times 30$

Ⓓ

minus Indian toll (head of cattle given up to cross lands)

Ⓔ  $\times \$$

price per head paid for cattle by Kansas buyer for your year

Ⓕ  $-$

minus per head cost in Texas

Ⓖ  $-\$400.00$

minus supplies, food, etc.

Ⓗ  $-\$1200.00$

minus salaries

**PROFIT**

# Cattle Buyer

## CATTLE BUYER IN ABILENE/ELLSWORTH, KANSAS

**INSTRUCTIONS:** Your job is to buy the cattle driven up the Chisholm Trail during the 1870s. Help compute each company's expenditures and profits by using the price chart for each year, and by aiding each Trail Boss in filling in the **Cattle Company Register and Profit Sheet**.

*Note: Don't let a trail boss know the price list until the time comes when the trail boss is ready to sell.*

### Sample Sheet

### Cattle Company Register and Profit Sheet

Company Name: Flying V Company

Company Personnel		Cowboy Name
Position	Real Name	
Trail Boss (Point Rider)	● Bob Treadway	● Mister J.D. Reed
	● Laura Diaz	● Juan Pardo
Swing Riders	● Jim Dewey	● Bronco Jim
	● Clay Jones	● Kit Carter
Flank Riders	● Jennifer Brown	● Ike Pryor
	● Darren Abbot	● Alfonso Chavez
Drag Riders	● Susan Holder	● Seth Mabry

Company Brand



Ⓐ # of cattle after roundup (paper balls) 85

× 30\*

2550

↓

Ⓑ Purchase price... (per head from Texas rancher) × \$4.00

10,200

Ⓒ # of cattle at end of drive (paper balls) 68

× 30

2040

Ⓓ - 10

\$ 2030

Ⓔ × \$ 25

\$ 50,750

Ⓕ - 10,200

\$ 40,550

Ⓖ - \$ 400.00

\$ 40,150

Ⓗ - \$ 1,200.00

\$ 38,950 **PROFIT**

(Circle your year.)

First on Trial ..... 1871

Second ..... 1872

Ⓙ **Third** ..... 1873

Fourth ..... 1874

Fifth ..... 1875

Sixth ..... 1876

Seventh ..... 1877

**Salaries:** For a 2-month drive, pay these wages: 10 cowboys, \$80 each; trail bosses, \$250; cook, \$100; wrangler (in charge of extra horses), \$50.00.

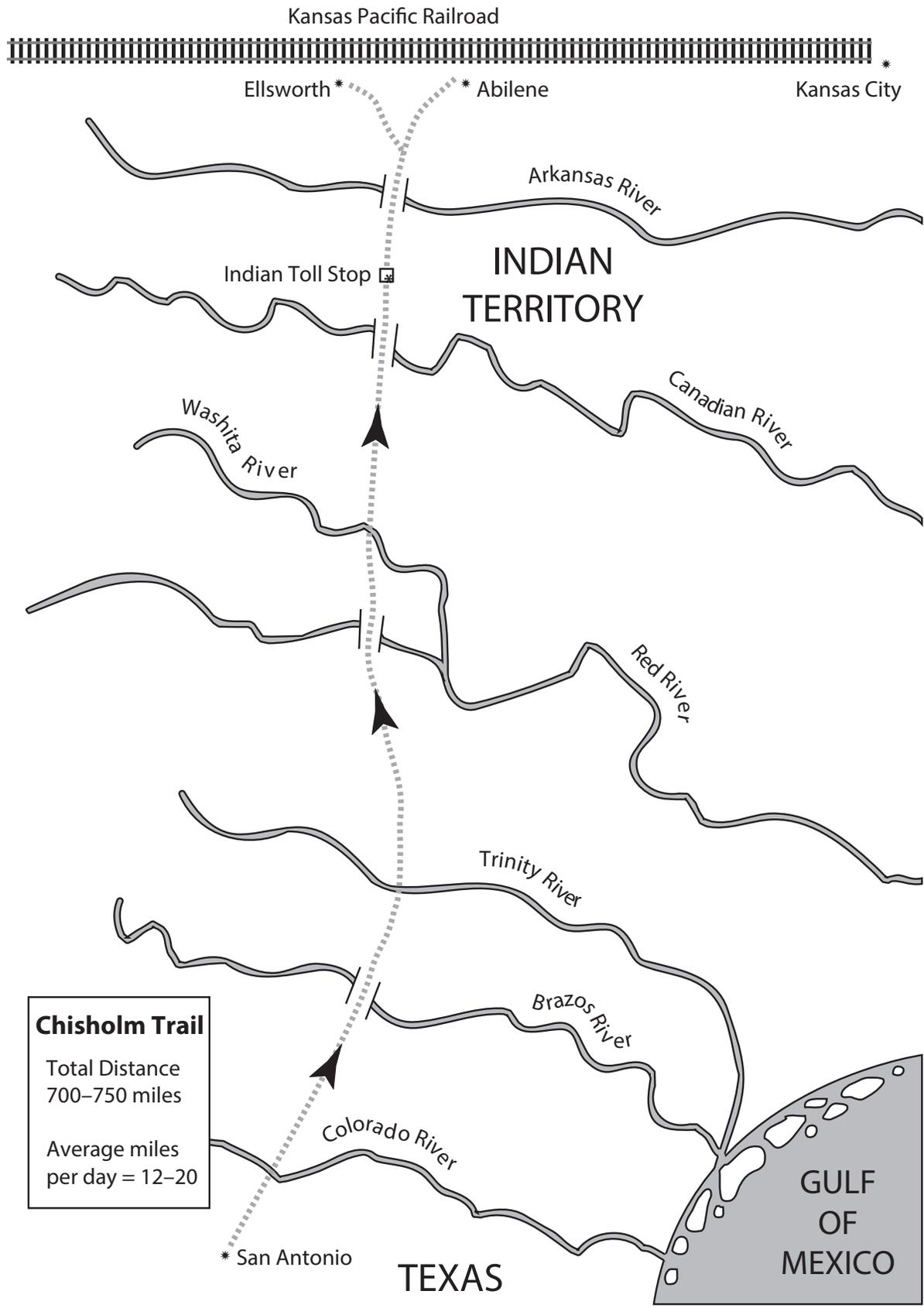
Total wages = \$1200

### Per-Head Cattle Prices in Kansas (by year)

- 1871 - \$40.00
- 1872 - \$35.00
- Ⓙ 1873 - \$25.00
- 1874 - \$32.00
- 1875 - \$30.00
- 1876 - \$37.00
- 1877 - \$39.00
- 1878 - \$40.00

\* Multiplying 30 times the number of paper balls gives each company a more accurately sized herd. (Average sized herd = 2500.)

# Chisholm Trail Map



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# Rules of the Trail

1. The Activator's purpose is for you, as a cattle company employee, to move/drive cattle over a trail from Texas to a Kansas cow town.
2. During the roundup phase, you will round up cattle and then brand them with your company's distinctive brand.
3. A card draw will determine the order (and thus what year in the 1870s) your company will head north to Abilene.
4. As a cowboy, you will be told at what position (point, swing, flank, or drag) you will be placed for the drive. All paper balls are then placed on a starting line. Because the steer Old Blue led herds north during cattle drives, each company will have a blue-colored paper ball at the head of its herd—including each time the herd "fords" a river crossing.
5. Once a "gunshot" is fired, your company begins its drive. Your company is to push the "cattle" with brooms in a fashion simulating the movement of cattle up the Chisholm Trail in the 1870s–1880s. While cowboys riding drag sweep the balls forward, the swing, flank, and point riders keep strays from being pushed/swept too far away from the rest of the herd. **Note:** *While speed is not the most important factor (maximum time on the trail is eight minutes), all cowboys must work in tandem with brooms to keep the herd cohesive and orderly on the trail.* Your teacher may choose a rough or a smooth trail on which you will move your herd. In either case, it will not be easy.
6. To accurately simulate a cattle drive to Kansas, three different kinds of incidents will happen:
  - **Rustling** involves two to four Frisbee tosses by rival companies from ten to twelve feet away as your "cattle" are bedded down. If any "cattle" are caught underneath the Frisbee (completely covered), they are considered "rustled" and are taken out of the herd before the drive resumes.
  - **Crossing four rivers:** Companies on the Chisholm Trail actually had to cross seven major rivers. (See the **Chisholm Trail Map**.) In this Activator, you sweep "steers" through a narrow six-inch opening between bricks to simulate fording a river at its shallowest point. Any "steers" pushed/swept *outside* the six inch parameters are considered drowned and are taken out of the herd.
  - **Crossing Chickasaw Indian land:** At some point during each drive, cowboys and cattle will be stopped for one minute to negotiate a fair price/toll to cross these lands safely. Only the trail boss may discuss and decide the revenue charge. A fair toll is three to eight head of cattle from the total (before multiplying  $\times 30$ ) or a five- to ten-cent charge per head.
  - **Reaching Abilene:** The trail boss will work with the cattle buyer to determine how many head survived (and thus will be sold) and what the price will be per head. Finally, the trail boss will compute final profits after salaries are paid out.

# Postscript

With the herds sold, money in their pockets, and temporarily out of a job until the following spring, cowboys bathed, shaved (but not their mustaches), got haircuts, and rode into one of those notorious cow towns to let loose and enjoy the pleasures not experienced for months—alcoholic spirits, poker, and women. One cattle drive terminus, Abilene, had as many saloons (the Alamo, the Bull’s Head) as reputable businesses. The pent-up energy of the cowboys and the alcohol often led to fights and even lethal gunplay. To police these cow towns, men like Tom Smith, James Butler, “Wild Bill” Hickock, Bat Masterson, and Wyatt Earp all wore badges as peace officers. In doing so, they, too, became a part of frontier history. Yet, after weeks of “painting the town,” cowboys soon ran low on cash (they usually earned only thirty dollars a month on the trail) and slowly headed south to Texas to prepare for another drive next year.

All told, between 1867 and 1887, a total of 5.5 million head of cattle were trailed north from Texas and eventually slaughtered for table beef.

This was the pattern for many cowboys until the railroad stretched farther onto the Plains and reached Colorado, Wyoming, and Montana in the late 1870s and 1880s. From that time on, the cattle industry settled in the northern Plains, raising not longhorns but a mixed breed of European Herefords and short-horned cows, specifically bred for better-tasting, more tender beef. Ranch life for cowboys on the northern Plains required the same skills of rounding up cattle, branding them, and then driving the herds to railhead towns. Now living as more or less permanent employees in bunkhouses, cowboys worked on large ranches perhaps owned by foreign-born cowmen and spent time year-round with tasks ranging from repairing fences to rounding up stray cattle.

These same years were characterized by conflicts with an increasing number of farmers who used barbed wire, a new invention for fencing that effectively ended the open-range era of the stockmen. Competition for land from sheep ranchers also shortened the life span of the cattle industry. Despite the seemingly perfect matchup of natural grasslands and cattle, other problems compounded the cattlemen’s situation. One in particular was the vagaries of the weather, which in 1886–1887 dealt the industry a crushing blow. Winter blizzards destroyed, in some cases, nearly 70 percent of the livestock. By the next spring, cattle carcasses were so numerous, streambeds and creeks were dammed up. This catastrophe brought a swift end to the cowboy’s heyday.

Nevertheless, the legend of the cowboy, this western knight on horseback, lived on, at first, through the pulp exaggerations of dime novels written by eastern dudes who realized substantial profits from stories about the disappearing frontier’s favorite character. At the same time, Buffalo Bill’s Wild West shows promoted the heroics of the cowboy. Then Hollywood picked up on the attractive myths in the early twentieth century and produced films and cowboy stars to match the legend. Bronco Billy Anderson, William S. Hart, and Tom Mix were the first of many film cowboys who, please note, never moved cattle on a long, dry, dusty drive, never mended barbed-wire fences, and never rounded up stray cattle in weather thirty degrees below zero!

Gene Autry and Roy Rogers continued the tradition of inaccurate versions of the real cowboy’s life. They even sang in their movies. During the 1930s and 1940s, and even into the 1950s with TV, this

romanticized cowboy myth was featured. Eventually, Hollywood responded with some memorable, if not totally authentic, films of cowboys on a cattle drive (1948's *Red River*, for example). Most cinematic attempts continued to glorify the cowboys, showing them doing things they never really did on a long drive in the 1870s. Even the popular rodeo cowboy seen all over the Rocky Mountain west and on sports cable networks in the summer tries to imitate the bronco-busting, bull-dogging skills of the genuine 1870 article.

Cattle raising on large ranches never stopped, of course. To this day, cowboys still brand and herd cattle. Most, however, rely on pickup trucks and other technology to sustain a modern ranch. Throughout the years, America generally stayed a beef-and-potato-eating population. By the late twentieth century, however, concerns about a high-fat diet and cholesterol's correlation to heart disease made many Americans severely restrict their intake of beef, despite the proliferation of fast-food hamburger restaurants such as McDonald's, Burger King, and Wendy's. Furthermore, a trend toward poultry consumption and vegetarianism has made the prospects of a continuing beef monopoly into the twenty-first century seem unlikely. While the American diet has changed, however, America's and the world's fascination with the mythical American cowboy rolls on in novels and films.



Image Source: iStock/nicolay.



# Historical Investigation Activity

## *Cattle Drive (1870s)*

By Bill Lacey

### Focus Question

How were cowboys portrayed by themselves and by contemporaries in the late nineteenth century?

### Materials Needed for This Historical Investigation

- **Documents A–H**—class set
- **Points to Ponder Response Sheet**—class set

### Lesson Plan

#### 1. Getting Started

- Ask students, “What can you tell me about the American cowboy and the cattleman’s frontier of the late nineteenth century?” Write responses on the board as spokes emanating from a hub and discuss responses.
- Perhaps after this discussion you might show a five- or ten-minute snippet of the cattle drive from the 1948 film *Red River*, starring John Wayne, to give students a visual sense of the topic.
- In addition, have students fill in a brief T-chart:

Movie Cowboys	Real Cowboys

- Last, pass out the **Points to Ponder Response Sheet** and have students answer question #1.

#### 2. Backstory to Use as Instruction

- The golden era of the cowboy—historically—was over by 1900, but in our culture and imagination he lives on, thanks to our movies, mostly. Over the years, many of us have enjoyed cinematic westerns, whether our favorite is *Butch Cassidy and the Sundance Kid*, *Red River*, *Silverado*, *The Cowboys*, *My Darling Clementine*, *True Grit*, or more recent fare like *The Revenant*. (The more recent ones are grittier and more blatantly violent.) Western films often portray both the myths and the realities of the various frontiers and characters of America’s movement across the continent.



- Many of our perceptions of the cowboy, perhaps the archetype of all westerners, come from three basic sources: contemporary newspapers and magazines, the words written by the cowboys and cattlemen themselves, and the western dime novel, the latter arguably the nineteenth century equivalent of the “B” western movie. The three rarely agree.
- Let’s get some background on the western dime novel. This genre appeared before the Civil War but flourished during the cowboy-cattlemen’s era (1860–1900). These novels, which sold for anywhere from five to twenty-five cents, were written to satisfy the eastern, citified dudes, who were fascinated by and curious about frontier life. New technologies in publishing and distribution made the “pulp” (made from pulp paper) increasingly popular. Authors like Ned Buntline, Edward Ellis, and Edward Wheeler (some would say that Zane Grey and Louis L’Amour continued the genre) wrote fast and feverishly to keep up with the demand for this kind of literature.
- First introduced by the Beadle brothers, the dime novel was a cheap form of entertainment. These books were marketed to an eager nationwide audience; the publishers were capitalizing on the public’s insatiable curiosity. Some literary scholars believe reading the western dime novels rekindled the “manly spirit,” disappearing as a result of the closing of the frontier, industrialization, and urbanization. Whatever it rekindled, “the pulp cowboy,” wrote one, “was neither a rancher nor cowpoke; he was a strong-willed, iron fisted symbol—Uncle Sam in a Stetson and chaps.” The pulps played a huge role in mythologizing the West.
- At first, scholars discounted the dime novels as a reputable source for research, but since the 1960s, cultural historians have mined the novels for greater understanding of late nineteenth century representations (false or otherwise) of the West.
- Though the characters have different names (except for serializations), they’re often showcased in a West that was exciting and dangerous. (It was, of course!) Wild rivers, formidable critters, snow-dappled mountains, expansive deserts, plenty of conflicts with rustlers and Indians, thrilling cattle drives, dusty roundups, and life-and-death shoot-outs in saloons and corrals—all were backdrops to excitement and adventure in rugged but wondrous settings.
- The western heroes of the novels were portrayed as very human: they sought justice and revenge; they were six-gun violent and self-reliant; they rescued beautiful women; sometimes they were redeemable outlaws (like Deadwood Dick). In the end the hero usually wins. In every case, the stories thrilled the readers and the books made lots of money for the writers.

## Cattle Drive: 1870s

### Historical Investigation Activity



- Though the pulps strove for realism (describing weapons and horses, for example), these dime novels about cowboys often exaggerated or fabricated certain character traits and deeds of their heroes (western icon Kit Carson said that his “biographer” “laid it on a leetle thick”). Stories were always overdramatized and romanticized. Writers often ignored the accounts being published that came from those cowboys and cattlemen themselves who were laboring out on the Great Plains. Most writers, moreover, never got west of Illinois, so their descriptions of the myths we try to dispel today—circling of the wagons, in-time arrival of the U.S. Cavalry, and stereotyped villains, desperadoes, and rustlers—were actually accepted as fact by an eager readership.
  - For us today, the key questions are: How accurate were the dime novels, when matched up to newspaper accounts and the words written by the cowboys and cattlemen themselves? And how does an assortment of primary source documents reveal the real cowboys of the American West? In short, despite the fact that the cowboys were colorful and romantic figures in their time, how did Americans, including fellow cowboys, in the late nineteenth century view them?
3. Ask students, “From our Activator, the backstory, and in your opinion, before we look at the documents, what do you think contemporary accounts—newspapers, dime novels, and words of cowboys and cattlemen—say about the American cowboys of the late nineteenth century?” Have a five- to ten-minute discussion.
  4. Say, “From our brief discussion, then, our working hypothesis seems to be . . .”
  5. Pass out the package of **Documents A–H** and explain what students are to do.
  6. Allow forty to fifty minutes for students (perhaps in pairs or trios) to read and analyze the document package. Perhaps you or a student should read aloud the first one or two documents and then discuss the gist of each. Remind students to analyze the documents carefully.

Name \_\_\_\_\_ Date: \_\_\_\_\_

# Points to Ponder Response Sheet

**Focus Question:** How were cowboys portrayed by themselves and by contemporaries in the late nineteenth century?

1. How were movie cowboys and real cowboys of the late nineteenth century different?

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2. **Documents A and B**

Writer	Year Written	Key Descriptive Words/Phrases	Positive or Negative

**Sourcing:** Which of the two sources is the most trustworthy/reliable? Why?

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3. **Document C**

	Year Written	Why Written	Key Words
Account 1			
Account 2			

Which account is more trustworthy? Why?

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Why would either account or both accounts exaggerate?

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4. **Document D:** What makes a dime novel's description of an episode from Deadwood Dick's life different from a newspaper's or an account such as Document A or B?

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What specific actions take place in Deadwood Dick's account?

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How often would some of these actions take place in a real cowboy's life?

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Why?

5. **Document E:** What specific problems for cowboys arise in this nonfiction account of a cattle drive?

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What effects do these problems have on the drover, George Sheffield?

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Would Sheffield have any reasons to exaggerate his recollections, similar to versions of a cowboy's life in a dime novel? Why?

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6. **Document F:** After reading this document, how do you know it is a dime-novel account?

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What is the account actually describing?

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As desperadoes, how are the James Gang treated by the author?

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## 7. Documents G and H

Writer/Publications	Descriptions of Cowboy Appearance/Behavior	Year Written

**Sourcing:** Which document would be more trustworthy and reliable to use as a source? Why?

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8. **Quick Reaction:** Write down five descriptive words that sum up the cowboy from the document package.

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9. Based on all the documents you analyzed, write a long paragraph answering the **Focus Question** at the top of this sheet. Make at least three major points to substantiate your point of view.

# Document A

## Joseph G. McCoy on Cowboys

Joseph G. McCoy, a prime mover and entrepreneur of the early cattleman's frontier, encouraged Texas cattlemen to drive their longhorn steers up the Chisholm Trail to the first Kansas cow town, Abilene. There they would meet the railroads and sell their cattle to Chicago packers. This recollection of a cowboy was written in 1874.

*He lives hard, works hard, has but few comforts and fewer necessities. He has but little, if any, taste for reading. He enjoys a coarse practical joke or a smutty story; loves danger but abhors labor of the common kind; never tires riding, never wants to walk, no matter how short the distance he desires to go. He would rather fight with pistols than pray; loves tobacco, liquor and women better than any other trinity. His life borders nearly upon that of an Indian. If he reads anything, it is in most cases a blood and thunder story of the sensation style. He enjoys his pipe, and relishes a practical joke on his comrades, or a corrupt tale, wherein abounds much vulgarity and animal propensity.*

Source: Joseph G. McCoy, *Historic Sketches of the Cattle Trade of the West and Southwest* (Kansas City, MO: Ramsey, Millett & Hudson, 1874).

# Document B

## Theodore Roosevelt Describes Cowboys

The future president was in fact a cowboy-rancher in the North Dakota Badlands during the 1880s. After the tragic death of his wife, Alice, in 1883, the twenty-five-year-old Roosevelt rode into the West and, long before he became a Rough Rider, governor of New York, and president, recounted his western adventures with “infectious enthusiasm,” including his description of cowboys.

*They are smaller and less muscular than the wielders of ax and pick; but they are as hardy and self-reliant as any men who ever breathed—with bronzed, set faces, and keen eyes that look all the world straight in the face without flinching as they flash out from under the broad-brimmed hats. Peril and hardship, and years of long toil broken by weeks of brutal dissipation, draw haggard lines across their eager faces, but never dim their reckless eyes nor break their bearing of defiant self-confidence.*

Source: Theodore Roosevelt, *Ranch Life and the Hunting Trail* (Mineola, NY: Dover, 2012). Originally published in 1888.

# Document C

## “Cowboys Are a Terror”

Easterners often relied on cheap publications for news about cowboys in the West. Much of this news involved violence and the bad behavior of the cowboys.

### Account 1

*While in town his home is in the saloons and the dance houses. He soon gets gloriously drunk and then begins to yell like a wild Indian and shoots off his big revolvers promiscuously into the crowd. He is little else than a crazy demon at such times and woe betide the man who crosses his path.*

Source: “The Cow-Boy of the Plains: A Sketch of a Very Boisterous and Often Murderous Character,” *Police Gazette*, September 6, 1879.

### Account 2

*When “off-duty” cowboys are a terror in the way they manifest their exuberance of spirits. Two or three will dash through a town, and, before the people know what is going on, will have robbed every store of importance and made their escape.*

Source: “Texan Cowboys on a Holiday Excursion,” *Frank Leslie’s Illustrated News*, January 14, 1881.

Source: Both accounts are taken from Rebecca Stefoff, *American Voices from the Wild West* (New York: Marshall Cavendish Benchmark, 2007).

# Document D

## Adventures of Deadwood Dick

Many people took the nickname of the fictional character Deadwood Dick, including real cowboy Nat Love. The nickname, however, is mostly associated with a series of sensational dime novels published between 1877 and 1897 by Edward L. Wheeler. Love's adventures in the West, which included a stint as a cowboy with the Duval outfit in the 1870s, were probably exaggerated in a book that Love boasted was true.

*During my employment with the Duval outfit and Pete Galligan I often made trips on the trail with herds of cattle and horses belonging to other ranch owners, and on these trips many incidents occurred, amusing and sad. The following incident happened in the fall of 1878, when I went up the trail with the half circle box brand outfit, belonging to Arthur Gorman and company.*

*We had a small herd of horses to take to Dodge City, where we arrived after an uneventful trip, and after disposing of the horses we started out to do the town as usual. But in this we met an unexpected snag. Our bookkeeper, Jack Zimick, got into a poker game and lost all the money he had to pay the cowboys off with, which amounted to about two thousand dollars, and also about the same amount of the boss' money. The boys had about one and a half years' wages coming to them, and consequently they were in a rather bad humor when they heard this bit of news. They at once got after Zimick so hard that he took me and went to Kinseley, Kas., where Mr. Gorman was. Arriving there he went to the Smith saloon to get a room, as Smith ran a rooming house over his saloon, and it was the custom for all the cattle men to make it their headquarters when in the city. Here he met Mr. Gorman, and we were sitting around the room and Zimick had only told Mr. Gorman a few things, when all of a sudden Zimick drew his 45 colt revolver remarking as he did so, "Here is the last of Jack Zimick." He placed the gun to his head and before we could reach him he pulled the trigger, and his brains were scattered all over the room.*

Source: Nat Love, *The Life and Adventures of Nat Love* (Los Angeles: Wayside, 1907).

# Document E

## On the Trail North with Drover George Duffield (1866)

Drover George Duffield started from Texas to Iowa with a thousand head of cattle. His account gives readers a realistic picture of cowboy life.

*[April] 5th Started for Sansaba with two wagons & 5 yoke Oxen & Seven hands Travelled 12 Miles & camped. Rained hard during the night*

*6th Every thing wet Morning cold & stormy & rainy travelled 12 Miles Hard wind & rain cold put up at Mr A Branch. . . .*

*May 1st Travelled 10 miles to Corryell co Big Stamped[e] lost 200 head of cattle*

*2ond Spent the day hunting & found but 25 Head it has been Raining for three days these are dark days for me.*

*3rd day Spent in hunting cattle found 23 hard rain and wind lots of trouble. . . .*

*13th Big Thunder Storm last night Stampede lost 100 Beeves hunted all day found 50 all tired. Every thing discouraging*

*14th Concluded to cross Brazos swam our cattle & Horses & built Raft & Rafted our provisions & blankets &c over Swam River with rope & then hauled wagon over lost Most of our Kitchen furniture such as camp Kittles Coffee Pots Cups Plates Canteens &c. . . .*

*20th: Rain poured down for two hours Ground in a flood Creeks up—Hands leaving Gloomey times as ever I saw. . . .*

*28 Cold Morning wind blowing & all hands shivering are within 12 Miles of Red River moved up 6 Miles. . . .*

*31st Swimming Cattle is the order We worked all day in the River & at dusk got the last Beefe over—& am now out of Texas—This day will long be remembered by me—There was one of our party Drowned to day (Mr Carr) & Several narrow escapes & I among the no.*

*June [1]st Stampede last night among 6 droves & a general mix up and loss of Beeves. Hunt Cattle again Men all tired & want to leave. am in the Indian country am annoyed by them believe they scare the Cattle to get pay to collect them*

*2ond Hard rain & wind Storm Beeves ran & had to be on Horse back all night Awful night. wet all night. . . .*

14th Last night there was a terrible storm Rain poured in torrents all night & up to 12 M today. . . .

19th Good day 15 Indians come to Herd & tried to take some Beeves. Would not let them. Had a big muss One drew his Knife & I my Revolver. . . .

22 Off for the River early to try to cross worked all day hard

23rd worked all day hard in the River trying to make the Beeves swim & did not get one over. Had to go back to Prairie Sick & discouraged. Have not got the Blues but am in Hel of a fix. Indians held High Festival over stolen Beef all night. . . .

[July] 20 last night we had another of those Miserable nights rain poured down Beeves ran wind blew was on my Horse the Whole Night are out 100.

21st Spent the day settling. . . .

26th Was notified that I could not go farther on that direction & we turn south west the day was warm & the Flies was worse than I ever saw them. our animals were almost ungovernable. . . .

[August] 8th Come to Big Walnut cattle stampeded & ran by 2 farms & the People were very angry but we made it all right was visited by Many Men was threatened with the Law but think we are all right now. . . .

Sept 1st moved the herd up to within 5 miles of Nebraska City—& went to Town took a good look over into Iowa. . . .

Nov 1st Shipped cattle from Burlington [to] Chicago

2ond Spent day at Union Stock yard & in evening drove cattle to Slaughter House to have them packed

3rd Viewed City & attended to packing

4th Busy all day at Work & looking at the wonders of a fast city

5th returned to Ottumwa [Iowa]

6th Got Home sick & tired & glad to get to rest

7th Spent Most of the day in Bed & feel badly

Source: George C. Duffield's Diary as printed in "Driving Cattle From Texas to Iowa, 1866," *The Annals of Iowa* 14, no. 4 (Spring 1924) 243–262.

# Document F

## In a Dime Novel, the James Gang Robs a Train

With titles like “Denver Dan, Jr. and His Band of Dead Shots,” “Daisy Dare, the Sport from Denver,” or “Buffalo Bill and the Silk Lasso,” dime novels were devoured by eastern readers. One excerpt below gives the reader the full drama of western fiction, featuring a train robbery by the notorious James Gang, real-life desperadoes.

### CHAPTER 11.

#### JESSE JAMES WORKS A COFFIN FOR A BIG HAUL.

CRACK!

CRACK!

CRACK!

*Unluckily for old Jack Farley, his aim was not equal to his courage.*

*His shots were both bad misses.*

*A shower of cold lead came in answer.*

*With a deep groan, the brave old engineer tumbled back, seriously wounded.*

*“Kill him Ned—kill him, boy!” he cried, thrusting the smoking pistol into Ned Jackson’s hand.*

*What Ned might have done if he had been given a chance it is hard to say.*

*The masked outlaws had spread themselves along the line of the train.*

*Some were armed with rifles, others with revolvers.*

*The latter now scrambled upon the platforms.*

*There were men to stand guard at either end of the cars, and men to go inside and relieve the frightened passengers of their money, watches, jewelry and diamonds, if they had any.*

*If any one had thought of fight they speedily abandoned the idea.*

*The hold-up had been too cleverly planned, too skillfully executed.*

*There was positively no other way but for everyone to give up, and be thankful if they came out of the scrape with their lives.*

Meanwhile, Jesse James was walking up and down through the snow, watching the movements of his men, giving directions where needed, making sure that everything was going to his mind.

Presently he encountered a tall, thin, cadaverous-looking man, and stopped to talk.

It was Frank James, the famous outlaw, fully as notorious as his brother, and credited by many with a longer head.

"Well, Frank, everything seems to be working all right," Jesse remarked.

"Right as the mail, far as I can see," replied Frank.

"I was sorry we had to shoot Jack Farley."

"So was I."

"Still it could not be helped."

"Certainly not. If these engineers will be fools and fire at us, they must take the consequences."

"Right you are; but I feel a sort of affection for the old man; you see this makes the third time we held him up."

"And the unlucky one for him. Is he badly hurt?"

"Bill Chadwell says no; the wound is in his left shoulder. Bill thinks he'll get over it all right."

"Glad to hear that. Are you still determined to carry out your plan, Jess?"

"I am."

Source: D. W. Stevens, *The James Boys and the 49ers: Or, The Search for the Lost Car of Gold* (New York: Tousey, 1897).

# Document G

## Recollections of “Teddy Blue” Abbott

E. C. “Teddy Blue” Abbott was a real cowboy in the salad days of the cattlemen’s frontier—the 1870s and 1880s. He helped drive a herd from Texas to Montana and then settled there to punch cattle, marry, and be a rancher for fifty years. He dictated his memories in the 1930s.

*They had very little grub and they usually run out of that and lived on straight beef; they had only three or four horses to the man, mostly with sore backs, because the old time saddle eat both ways, the horse’s back and the cowboy’s pistol pocket; they had no tents, no tarps, and damn few slickers. They never kicked, because those boys was raised under just the same conditions as there was on the trail—corn meal and bacon for grub, dirt floors in the houses, and no luxuries. . . . They used to brag they could go any place a cow could and stand anything a horse could. It was their life. . . .*

*In person the cowboys were mostly medium-sized men, as a heavy man was hard on horses, quick and wiry, and as a rule very good-natured; in fact it did not pay to be anything else. In character their like never was or will be again. They were intensely loyal to the outfit they were working for and would fight to the death for it. They would follow their wagon boss through hell and never complain. I have seen them ride into camp after two days and nights on herd, lay down on their saddle blankets in the rain, and sleep like dead men, then get up laughing and joking about some good time they had had on Ogallala or Dodge City. Living that kind of a life, they were bound to be wild and brave. In fact there was only two things the old-time cowpuncher was afraid of, a decent woman and being set afoot.*

Source: E. C. “Teddy Blue” Abbott and Helena Huntington Smith, *We Pointed Them North: Recollections of a Cowpuncher* (Norman: University of Oklahoma Press, 1939).

# Document H

## “Large-Hearted” Cowboys

Along with some articles which painted the cowboy as a “bad guy,” other publications saw a different image—the “good guy.” Perhaps one reason for the change was the appearance and popularity of Buffalo Bill Cody’s Wild West show, which toured the major U.S. cities from the 1880s into the twentieth century.

### Account 1

*Cow-boys as a class are brimful and running over with wit, merriment, good-humour. They are always ready for any bit of innocent fun, but are not perpetually spoiling for a fight, as has so often been said of them. . . .*

*. . . They have been known . . . to resort to acts of real abuse and injury against defenceless people. But such acts on the part of genuine cow-boys are rare, and are rigorously condemned by all the respectable element in the business. . . .*

*Altogether cow-boys are a whole-souled, large-hearted, generous class of fellows . . . and it is safe to say that nine-tenths of the hard things that have been said of them have come from men who never knew intimately a single one of them.*

Source: G. O. Shields, “Some Facts about Cow-Boys,” *Harper’s Weekly*, October 16, 1886.

### Account 2

*In this cattle driving business is exhibited some most magnificent horsemanship, for the “cow-boys,” as they are called, are invariably skillful and fearless horsemen—in fact only a most expert rider could be a cow-boy.*

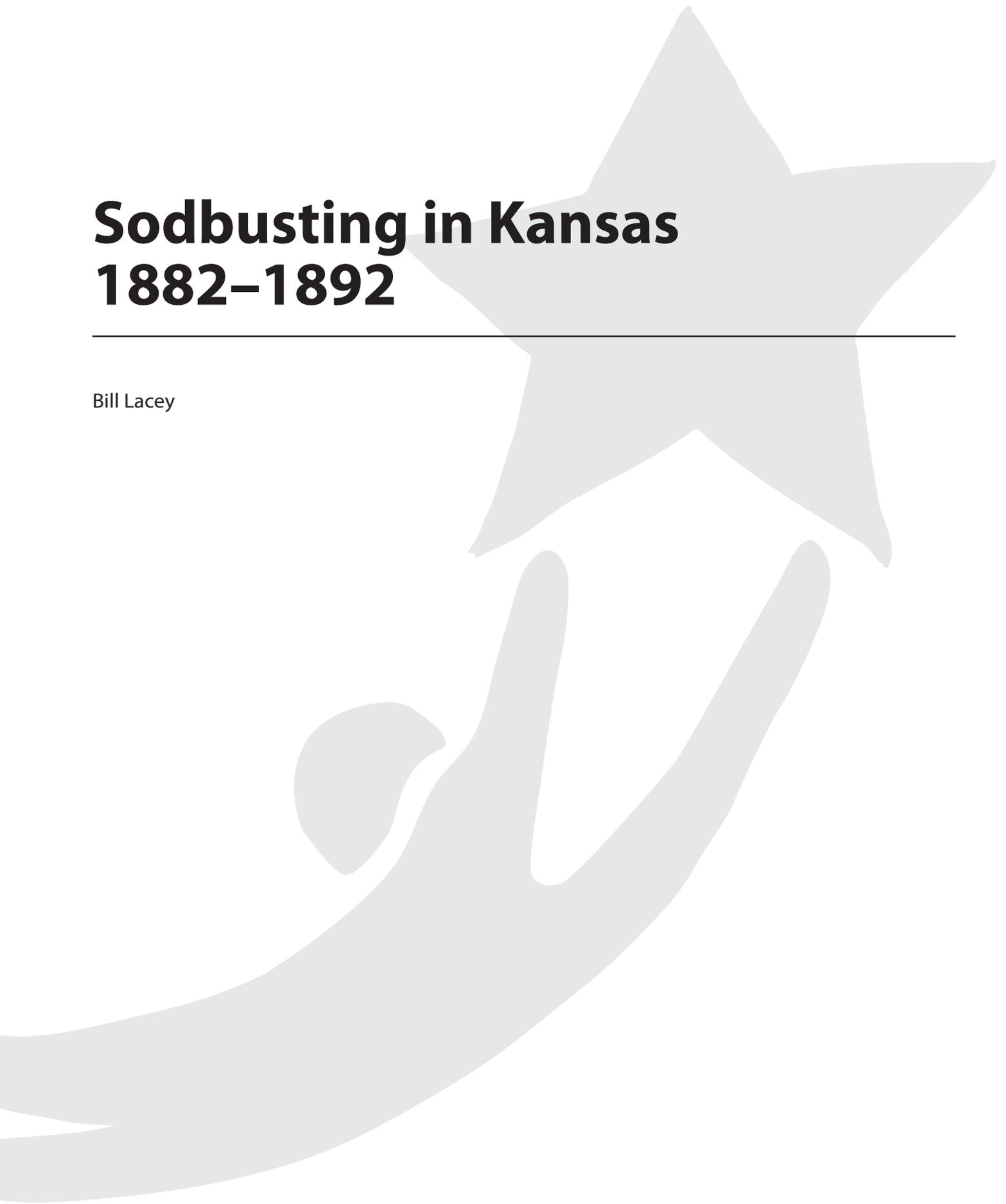
Source: *The Life of Hon. William F. Cody Known as Buffalo Bill, the Famous Hunter, Scout and Guide: An Autobiography* (Hartford, CT: Frank E. Bliss, 1879).



# **Sodbusting in Kansas 1882–1892**

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Bill Lacey



## Lesson Plan

### Overview

Into the heartland of America went eager pioneers after the Civil War to farm fertile acreage offered by the Homestead Act of 1862. What they found was a land of extremes—cold, unyielding winters with arctic blasts, tornadoes, unending spring rains and thunderstorms, and blistering summer months with drought so bad the dry, parched soil literally blew away. Add to these miseries the sudden appearance of and destruction by locusts and grasshopper plagues, and the economic woes from gouging railroad and grain companies, new machines that produced surpluses (and thus lower prices for crops), and a new competitive world market. The farmers of the post-Civil War era were beset with seemingly unsolvable problems. Most stayed and made lives on the Great Plains states of Kansas, Nebraska, and the Dakotas.

Now your students will become these hearty farmers on the American prairies, sodbusting their 160-acre plots, planting crops, and raising livestock while battling the vagaries of nature for five separate years: 1882, 1884, 1886, 1888, and 1892. Will your novice plow jockeys survive, perhaps even thrive? Challenges await them.

### Setup

#### 1. Duplication

- **Background Essay**—*class set*
- **Background Essay Roles** (cut into quarters)—*one copy of each to the four students chosen to read the parts.*
- **Postscript**—*class set*
- **My Kansas Farm**—*class set.* (Note: This handout covers all essentials of the activity, including The Challenge, Farming Decisions, and How to Farm.)
- **Farm Profit Sheet**—*five copies* for each student participating (one page for each of the five years simulated: 1882, 1884, 1886, 1888, and 1892)
- **Annual Farm Report**—*one master copy* for you to read (or record and play) after each year's farming. (These pages are confidential—teacher only!)

- #### 2. Schematic, costumes, sets, props:
- The **Schematic** clearly shows how to set up your classroom, with student farms on the Republican River in Clay County, Kansas. The graphic has students farming solo, but consider putting students in farm families; after all, farming was

a cooperative occupation. There is no need for any costumes, sets or props to enhance this Activator. The excitement your students will exhibit throughout will come from profits gained and losses each year, as K-O-R-N farm expert Bub Barlow announces the results after each planting season.

### 3. Roles

- a. In this Activator, all students are plow jockeys (farmers). All students try to farm their homesteads for five years.
- b. As a flourish, select four dramatic students to read/perform the roles of Chunk of Sod, Hoppy, Lars Hansen, and Ingrid Hansen. These roles play out during the reading of the **Background Essay**.

4. **Annual Farm Report:** Students learn the results of each farming year from Bub Barlow's confidential **Annual Farm Report**. It is suggested that you, the teacher, prerecord Bub's report with a dramatic Midwest farmer's voice, and then play the yearly segments at the appropriate times. In a pinch, you or a lively student could read the reports aloud, but playing a prerecorded version sounds like radio (even though radio wasn't invented until the twentieth century).
5. **Historical accuracy:** Most of the natural catastrophes detailed in the Activator did happen to Kansas sodbusters, if not in the exact years they occur in the activity. Many occurrences and events have a basis in fact. For example, the winter blizzards and freezing temperatures of 1886–1887 did indeed devastate cattle on the Great Plains. The shortage of these animals would, over the next year or two, demonstrate a supply-and-demand price increase. In addition, the grasshopper plague did happen, but the worst invasion was in 1874, not 1886.
6. **Livestock limitations:** Make sure students do not go over the livestock number restrictions (cattle—cows, sheep, and hogs are **50** each maximum; poultry are **200** maximum). More than these numbers would make the farmer a cattleman or sheep man, which he was not.
7. **Farm loans ("busted"):** Some students will "bet the farm" and take farming risks. Out of money, they will come to you for a farmer's mortgage loan of a thousand dollars to keep their farms operating. Tell them the bank has approved their loan at a 20 percent interest rate. Validate the transactions by writing the student's name under **Farmer's Mortgage Loan** on the board.

### Directions

1. Hand out the **Background Essay** to your students the day before this class as homework. On the day of the activity, choose four students to play the **Background Essay Roles**, and read the essay out loud.
2. On the day before or morning of the activity, rearrange the classroom according to the **Schematic**. Perhaps use some creative ideas to make the ambience of your classroom resemble land adjoining the real Republican River in Clay County, Kansas. Display the **Schematic** to help students visualize the rearranged classroom if you would like them to assist in moving the desks.
3. Tell students, “This two-day activity simulates the farmer’s experience in Kansas from the years 1882 to 1892. For five separate years, you will try to operate your 160-acre farm, survive, and, at the same time, try to make a profit.”

You have two options for conducting this Activator:

### Option A

This version will play out in at least two days.

1. Pass out a class set of **My Kansas Farm** and have various students read each segment aloud. Move on to **Farming Decisions** and **How to Farm**. Each of these parts is vital. Be prepared to explain any detail within these categories.
2. Once done, pass out the **Farm Profit Sheets** to each student. Display the **Farm Profit Sheet (Sample)** and further explain how to farm.
3. Clarify the livestock limitations and the planting of crops and raising of livestock in units of five and ten to simplify the math required in the activity.
4. Once done, release students to plant their crops and then show their work on the 160-acre square on the **1882 Farm Profit Sheet**. Closely monitor students, especially in this first year.
5. Allow several minutes for decision making, planting, and filling in the **Farm Profit Sheet**. Remind students that they will find out later over the radio what numbers are to be written down on the **Return Factor** column. Also, point out the **Savings** option.
6. When all farmers have completed their “chores,” stop all work and read/play the **1882 Farm Report**. To help students, you may want to write the numbers for the **Return Factor** in order on the board.

7. After Bub Barlow's Report in 1882, use the **Farm Profit Sheet (Sample)** to show students again how to multiply numbers and total up the year's profits. Add savings amounts if applicable.
8. Once students have completed their math, have them go to the next sheet (1884). As they begin working, remind them of their **Living and Freight Charges**, which have to be subtracted from their profits of the previous year.
9. Repeat the farming cycle for 1884, 1886, 1888, and 1892.

### Option B

1. Pass out a class set of **My Kansas Farm** and have various students read aloud each segment. Move on to **Farming Decisions** and **How to Farm**. Each of these parts is vital. Be prepared to explain any detail within these categories.
2. Option B differs from **Option A** in the following ways:
  - Keep students in their regular seating arrangement.
  - After each farming year, merely read the **Farm Report** without Bub's voice or drama.
  - Exclude any mortgage loans. If a farmer goes bust, they are out of the activity; have this "busted" farmer help another sodbuster in the remaining years.
  - Limit your activity to three or four years, instead of five. This will shorten the activity and still give students a feel for what farmers went through.
  - Omit the **Background Essay** entirely. Merely refer to your school text for background and start the activity's preparation with **My Kansas Farm**.
  - Omit the **Postscript** in the **Debriefing** section. Merely summarize what happened to farmers using data from the **Postscript**.

### Debriefing

Decide whether you wish to use a short or long debriefing. Here are possible ways to make the Activator experience more meaningful:

### Short Debriefing

1. Decide whether or not you want to use class time to read aloud or lecture on the data within the **Postscript**. You can also choose to briefly summarize the data. In any case, some sort of closure is essential.
2. Ask students to discuss what they learned and felt while being Kansas sodbusters.
3. Consider having students write a Learning Log entry following any discussion you have.

### Long Debriefing

Use one or more of the following debriefing activities.

1. Pass out the **Postscript**, lecture using the data, or merely summarize the details and main points.
2. Have students write a postcard to relatives in Ohio about experiences they have had as a farmer in Kansas during the years of this activity. Include why they have decided to “stick it out” or return to Ohio, “busted.”
3. William Jennings Bryan’s stirring last words of his “Cross of Gold” speech to convention delegates in 1896 were: “You shall not press down upon the brow of labor, this crown of thorns; you shall not crucify mankind upon a cross of gold!” Have three or four students compete in a speech contest by delivering these words.
4. Have students make a list of all the chores required of children on a Kansas farm, at the same time prioritizing the tasks they would least like to do.
5. Have students compose a haiku/senryu using the formula of three lines of seventeen total syllables:

Line 1: 5 syllables

Line 2: 7 syllables

Line 3: 5 syllables

Choose from these subjects:

- The sod house
- Grasshopper/locust plague
- Populist Party

- Loneliness on the homestead
  - Farm life
  - The Homestead Act of 1862
  - Bryan’s “Cross of Gold” speech
  - The Great Plains
  - The Grange
  - Weather extremes
6. **Discuss:** Who had the hardest workload on the farm—men or women?
  7. **Ask students:** If you were to create an agenda for a Grange meeting, what topics would be on it? Why?
  8. **Discuss:** Many western states, including Kansas, were the first in the Union to grant basic human rights and suffrage to women. Why is this so? Pick one reason from below and defend your choice:
    - Pioneer husbands and wives had come to rely on and truly value one another.
    - Females in the West worked so hard to survive and thrive that men felt women deserved equality.
    - Politicians in western states wanted as many voters as possible to give their state some additional clout on the national stage.
    - Women were thought to be a “civilizing” influence and thus equality just made more sense.
    - The hope that western politics would be more open to experimentation spurred a strong women’s movement for equality.
  9. **Discuss:** There are very few farmers today (perhaps 2.2 million, making up less than 1 percent of the U.S. population), and this fact is supported by the growth of large agricultural conglomerates. If 1885 farmers were beamed to the present day, what would they say and think about the state of farming in the United States?
  10. Have students come up with a clever slogan for farmer problems of the 1865–1900 era. What symbols could be used to sum up these problems in a logo?
  11. Show a clip from a film in the **Visual history** section to your class.

Have students write a Learning Log entry about their experiences as a farmer in this Activator.

### Resources to consult

Billington, Ray Allen, and James Blaine Hedges. *Westward Expansion: A History of the American Frontier*. New York: Macmillan, 1949. Chapter 25.

Dick, Everett. *The Sod-House Frontier, 1854–1890: A Social History of the Northern Plains from the Creation of Kansas and Nebraska to the Admission of the Dakotas*. New York: Appleton Century, 1954.

Emmons, David M. *Garden in the Grasslands: Boomer Literature of the Central Great Plains*. Lincoln: University of Nebraska Press, 1971.

Fite, Gilbert C. *The Farmers' Frontier, 1865–1900*. New York: Holt, Rinehart and Winston, 1966.

Horn, Huston, and the editors of Time-Life Books. *The Old West: The Pioneers*. New York: Time-Life, 1974.

Ise, John. *Sod and Stubble: The Story of a Kansas Homestead*. New York: Wilson-Erickson, 1936.

Sischo, David. *Involvement 2: Six Involvement Exercises for United States History, 1880–1918*. Vol. 3. Fish Camp, CA: Involvement, 1995.

Webb, Walter Prescott. *The Great Plains*. Boston: Ginn, 1931.

Welsch, Roger L. *Sod Walls: The Story of the Nebraska Sod House*. Broken Bow, NE: Purcells, 1968.

### Visual history

Why would any filmmaker spend time making a feature or documentary on the farmers of the 1865–1900 era? Because they can, and mere photographs of a Kansas farm family sitting in front of a sod house in 1884 sparks, in most people with vivid imaginations, questions like: Why would they choose to be there? One can see suffering in the calluses on their hands or the wrinkles on their faces. Yet, television and Hollywood have gambled and made some memorable visual snapshots of farm life.

### Feature films

*Heartland* (1979), an indie hit, exposed harsh farm life in Montana.

*Sarah, Plain and Tall; Skylark*; and *Sarah, Plain and Tall: Winter's End*, a trilogy of TV movies made between 1991 and 1999, starred Glenn Close and Christopher Walken.

*Little House on the Prairie* (1974–1983) starred Michael Landon as head of the Ingalls family.

*Pioneer Woman* (1973), a TV movie starring Joanna Pettet and William Shatner, details the lives of one homesteading family as they experience just about everything that could happen in 1867 Wyoming.

**Documentaries**

In 2002, PBS broadcast *Frontier House*, a program that featured three modern-day families trying to replicate for three months what life was like for homesteaders in 1883 Montana. Their struggles included going without most all modern conveniences (e.g., electricity, medicines, and toilets). Also check out *Crash Course* on YouTube.

# Background Essay

**Place:** Clay County, Kansas

**Time:** 1882–1892

## **The Great Plains**

Once called the “Great American Desert,” this landmass in the middle of the United States that you have chosen to settle on is not like anything you are familiar with back East. The blistering summer heat, still air, drought, and parched soil from lack of rain, along with cold, raging blizzards in winter, hailstorms, and tornadoes, have been providing farmers like you with exhausting challenges since you took advantage of the Homestead Act of 1862. This congressional act gave you and your family a new opportunity out West.

## **Adapting to the plains**

The prairies and plains force pioneers like you to discard normal ways of farming and make adjustments or adaptations, devising new and more workable solutions to survive. Mostly it comes down to three major innovations of human ingenuity to adapt to and “conquer” this new and strange environment: sod buildings, barbed wire, and windmills. Building a home is the first, immediately pressing need—a place to live. Beyond the 98th meridian, the land is virtually treeless. With little to no wood for home construction, farmers learn to build their homes out of chunks of sod, or “Nebraska marble.” (At this point a student voices the words of **A Chunk of Sod**.) Sod houses are inexpensive and rarely blow over after being hit with the high winds of Kansas. The lack of wood also forces farmers to use a substitute for heating and cooking fires: dried buffalo and cattle manure—in Kansas parlance, “chips.”

## **Windmills and barbed wire**

Two other major problems—lack of groundwater and protecting you farmers from ranch cattle on the plains—are lessened, if not solved,

by windmills and barbed wire. Since water is essential to plains agriculture, farmers like you have discovered methods to bring water up from underground wells. This is expensive, so farmers are building their own windmills and christening them with endearing names like “Jumbo” or “Battle-ax.” Major wars in the West have erupted countless times, mostly over water rights. Fortunately, barbed wire is somewhat solving the problem of separating farmers from cattlemen. Of all different versions of barbed wire, the one devised by Joseph F. Glidden has proved to be superior to all the rest. Successful as fencing right from the start, Glidden’s barbed wire was soon mass-produced. Resistance to barbed wire—the “Devil’s rope”—has come from the cattle ranchers, who needed the plains to be unfenced. Threatened by extinction by you nesters, the cattlemen have been fighting for an open range and often resort to sealing off vital water sources, cutting wire fences, and sometimes fighting range wars with local farmers.

## **Nature’s critters**

If it weren’t enough of a challenge to survive the cattlemen, heat, cold, blizzards, and drought, nature continues to conspire to send even more misery in the form of locusts and grasshoppers, critters that can descend on farm communities without warning. (A student playing **Hoppy** speaks.) Along with grasshopper and locust plagues, prairie fires have become one of the great terrors for farmers on the plains. Any one of several accidents could ignite a prairie fire: A spark from a campfire, the discharge of a gun, or a sudden bolt of lightning could start a blaze and burn dry prairie grass, destroy livestock in barns, and take human lives.

**Life on the plains**

Even with all the challenges of prairie living, many of you farm families will stick it out and find a few pleasures in your farm communities, where neighborliness and hospitality are maintained, even exalted. A community spirit permeates the plains, and the many social occasions—barn raisings, weddings, christenings, sewing bees, county fairs, and the like—make life somewhat tolerable. Picnics, barbeques, raffles, and occasional circus troops and competitive sports add to your enjoyment.

**Lars and Ingrid Hansen**

Perhaps the best way to sum up what living on the Great Plains and facing the challenges of farming is like, is to hear the testimonials of two Swedish immigrants, typical of settlers like you in the 1865–1900 era. Let's hear from them. (*Two students playing **Lars and Ingrid Hansen** now speak.*)

**On to Kansas**

The state of Kansas is the center of the Great Plains. Some have called it the “navel of the nation.” It has a colorful and storied history, in part because of its favorable location. Kansas beckoned railroad construction in the mid- and late nineteenth century. After the Civil War (1861–1865), Kansas continued to play a major role in U.S. history. Several Kansas towns served

as the terminus for cattle drives from Texas. From these cow towns (e.g. Abilene, Dodge City, Ellsworth), cattle were “shipped” to meatpacking plants in Chicago and Kansas City. After the Civil War (1865–1885), the railroads carried beef cattle east and brought hopeful farmers west to Kansas, luring settlers from eastern cities and from Europe. Even newly freed African Americans, called “exodusters,” came to Kansas. Migrants were encouraged to come and tame the Kansas wilderness, plow up its loamy, fertile soil, and conquer nature's challenges. The railroads also promised a virtual paradise, a garden, where any seed can be planted and its fruit harvested with relative ease. Despite the reality of hard work, disappointments, and uncertainties, homesteaders like you believe that the Great Plains is a land of opportunity.

**Corn, wheat, hogs . . . cattle?**

It's time to farm! Now you will “sink a plow”, break up your own Kansas sod, try to eke out a living from its fertile soil, and pray for adequate rainfall. Be ready for anything and everything that nature has to offer. For ten years, you will “plant” crops and “raise” livestock with the goal of surviving, if not thriving. As a pioneer settler, be alert, look farm life square in the face, and prepare for the worst. Meanwhile, ask yourself: Shall I plant corn or wheat, beans or sorghum? Shall I raise hogs or cattle . . . or chickens, maybe? Decisions await me!

# Background Essay Roles

## A Chunk of Sod

I am a chunk of sod. Some writers called me, and other chunks, Nebraska marble! Just call me “Chunk.” Usually we don’t have a voice, but there are millions of us! Few trees grew in the prairie, so we chunks of sod became the building blocks for the prairie houses. We chunks became a wood substitute! Farmers also had to make several other adaptations to survive on the Great Plains. They built windmills to bring up water, iron plows to break up the cement-like ground, barbed wire to keep out cattle and sheep, and used the technique called dry farming. Farmers cut us sods into 12- by 30-inch pieces, leaving us three inches thick. Some wood was used to frame the windows and doors and serve as floor planks. A finished house was called a “soddy,” generally warmer in the winter and cooler in the summer, even though it leaked after heavy rains and was full of bugs and spiders. Another good thing: prairie fires never hurt sod houses!

## Hoppy

### The Unwelcome Grasshopper

The unwelcome critter—that’s me! Call me “Hoppy” for short. I’m one of the most hated critters on earth, especially on the prairie. Farmers feared our rare appearances. We came by the millions, just like our ancestors mentioned in the Bible—locusts. We pelted sod houses and barns like hailstones. When we landed on trees, limbs broke from the weight. And as insects, we ate everything—grain, vegetables, tree bark, clothes, cornstalks, tool handles, harnesses; and we even fouled the water too! When we landed on railroad tracks, trains skidded on our slippery and gooey remains. After our “plague” hit a region, it was a scene of devastation and ruin. Farm families packed it in and hightailed it to Chicago, never to return again.

## Lars Hansen

### Farmer/Sodbuster

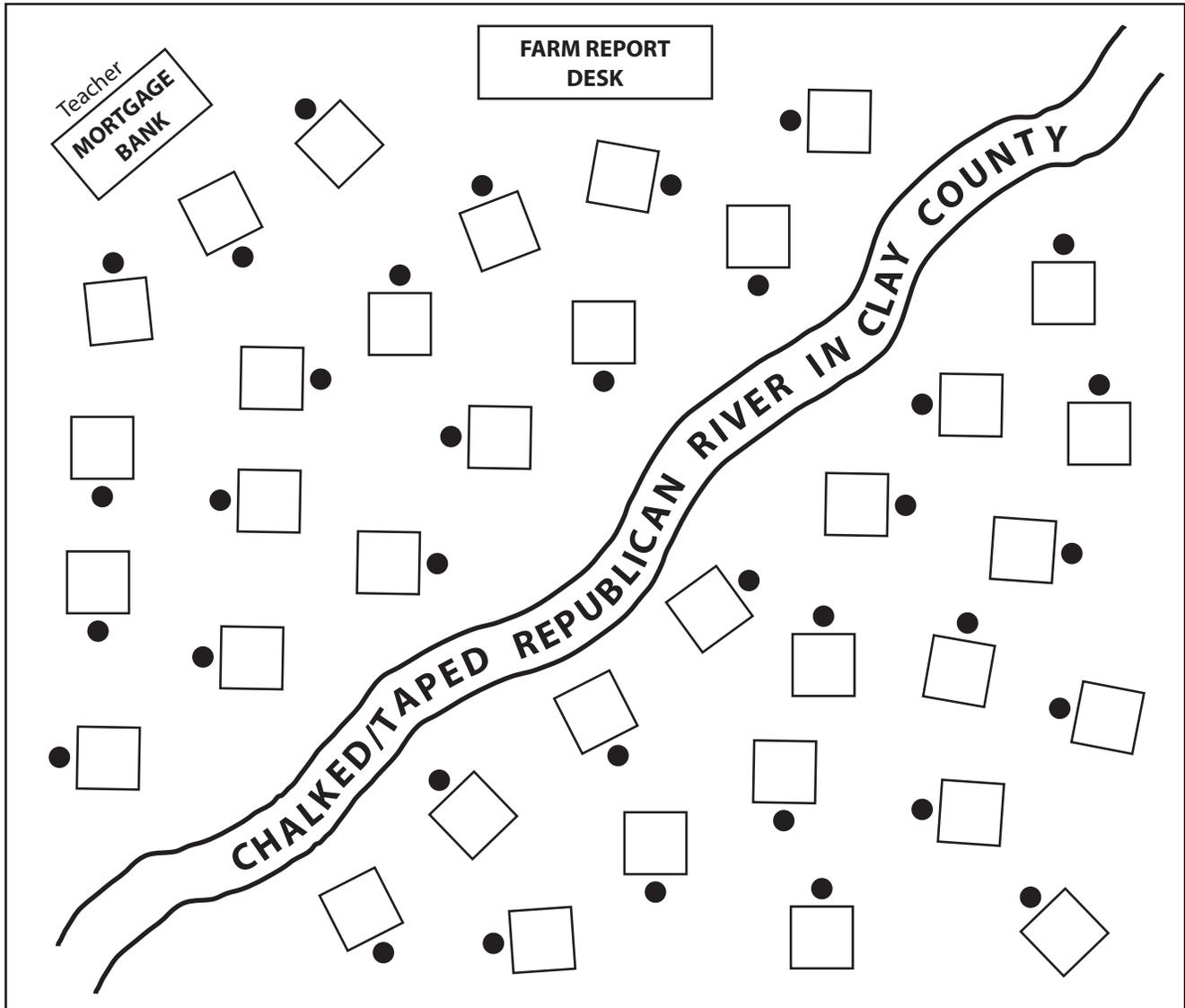
Ya! I am Lars Hansen, a hard-verking sodbuster, or farmer, in North Dakota. Me, my sons, and da vimmen in dis family do yest about everyting vit our hands. No gasoline-driven machines or machine powered by electricity. I still pump vater vit my arms and hands. Vee use axes, saws, spades, pitchforks, and scythes. Often, vee make use of horses, oxen, or mules to pull a plow and harrow. Someday, I hope to haf machines to do most of da verk. It’s all hard, backbreaking verk but I am my own boss, ya, and vee provide for most of my family’s needs. Vee as farmers are proudly independent, if poor, but also isolated and at the mercy of others to sell and distribute our crops.

## Ingrid Hansen

### Farmer’s Wife

Ya. As a farmer’s wife, I too verk my fingers to da bone. The vimmen here cook using an iron stofe. Sometimes vee eat notting but corn, corn, corn. For vormth, I keep my stofe burning au day vit vooden logs, buffalo chips, or twisted hay and cornstalks. I haf no lights save a kerosene lamp. Vee grow our own vegetables. Vee catch and slaughter animals for our meat. Our sod house is drafty and leaks after a rain. Someone joked dat vee had running water in our sod house! But it came from da roof. The nearest town is eight miles away and the closest neighbor is two miles. It can be a lonely life. Thank god we haf lots of social activities wit neighbors. Vee go to church and town ven vee can. Lots of times vee haf “bees,” gatherings to raise barns, shuck corn, sew clothes, or just talk.

# Schematic



## Suggestions

- Have desks arranged so some face each other and others don't (simulating social needs/cooperation among farmers and their frequent isolation).
- As an option: Pair up a few students and let them farm together as a sodbusting couple.
- Chalk or tape off the river in the middle of your classroom.
- Utilize a quality sound system for Bub's yearly farm reports.

## Characters needed

- All students are plow jockeys/farmers.
- There is no need for narrators, leaders, etc.

# My Kansas Farm

## The Challenge

It's your turn to accept the challenge of heading west into Kansas to become a sodbuster—to break the soil, raise crops, livestock, and a passel of kids. Two months ago, for a simple ten-dollar filing fee, you were given 160 acres in Clay County, about eighty miles west of Topeka. Clay County, a twenty-five to forty-mile rectangular area, has mostly medium and short grass with some trees (sycamore, oak, ash, elm, and cottonwood) in a section between the Republican River and Buffalo Creek and around Lake Milford. Temperatures for this county average 91 degrees to 68 degrees in July, and 40 degrees to 20 degrees in January. It rains about twenty-five to thirty inches a year, mostly April through July. Snow and blizzards are common, as well as thunderstorms and tornadoes. Locusts and grasshoppers can appear suddenly and destroy everything in sight, including crops, animals, river water, saddles, and trees. Extremely dry conditions and droughts can last for months.

As a Kansas farmer, you are encouraged to grow winter wheat ("Turkey Red"), as your primary crop. It is an especially hardy grain brought to Kansas recently by the Mennonites. You should also consider a variety of crops and animals for your 160-acre farm. Resist planting one crop or raising one kind of animal. In short, don't go "whole hog" on anything—including hogs!

## Farming Decisions

As you "farm," you will make several important decisions during the five years simulated in this activity. They include:

1. Shall I put most of my acreage into crops and minimize stock (animal) raising or have a balanced combination of both?
2. If I decide on mostly crops, shall I raise wheat primarily with some corn or a combination of all the crops available to me as a farmer (barley, peas, sorghum, hay, beans, oats, etc.)?
3. If I lose or gain profit one year, shall I continue to raise the same crop and livestock animals the next year?

## How to "Farm"

The object of the activity is to gain as much profit as you can. This would guarantee your survival as a farmer each year.

1. In simplifying this farming activity, all sodbusters will be bankrolled with \$2000—quite a sum in 1882—and given 160 acres along the Republican River in Clay County.
2. You must plant your crops or raise your livestock and poultry in units of five or ten. Beef cattle, milk cows, sheep, and hogs are limited to fifty head each. Poultry is limited to two hundred. This simplifies the required math, but bring a calculator to class!
3. Although it is not encouraged, you could plant all your acres in corn, hay, or sorghum (a tall tropical cereal grass resembling corn used for feeding livestock, or for making molasses and syrup) if you wish. You can take these risks as long as you don't exceed the 160 acres in the "Acres Planted" column, and you don't exceed the amount of money you have left over from the previous year.

4. From the beginning capital of \$2000, you must take out \$500 for living expenses each year and another \$300 for transporting your crops and livestock on the local railroads and to pay the distributors (grain elevator operators, etc.) for their work in getting your products to large markets. Thus, you must subtract \$500 for “living expenses” and \$300 for “freight charges” for the first year. This means that for the first year (1882), you have only \$1200 as investment capital to spend on crops and livestock. Costs for the last four years will be announced at intervals.
5. If you do not wish to spend all of your capital, you may put as much money as you like into “savings” each year. Keep in mind your money in “savings” does not increase and your living expenses and freight charges continue each year and may increase.
6. You should utilize the 160-acre graphic square to visually divide and label the crops you plant for that particular year. This is not necessary for livestock, whatever the number. Livestock (milk cows, beef cattle, sheep, hogs, or chickens) should be accounted for on the “Farm Profit Sheet” columns, if not on the 160-acre rectangle graphic.
7. If you “go broke” (“busted”) before the final year is over and need a loan, contact your teacher for a “Farmer’s Mortgage Loan.” This will, of course, increase your debt to the local Farmers’ and Merchants’ Bank in Morganville. For the record, you may borrow \$1000 at 20 percent interest (\$200).
8. It is essential that you add, subtract, and multiply correctly and honestly. Farmers are generally honest, law-abiding folk. If they weren’t, they’d be playing cards down at the Long Branch Saloon. As an example of the simple math requirements, note the sample page.
9. As an independent farmer, you can fill in most of the columns on the Farm Profit Sheet on your own. One column, “Return Factor,” can be filled in only after hearing the farm report on the “radio station” K-O-R-N out of nearby Topeka. Listen carefully to old Bub Barlow sum up each year’s crop and livestock returns.

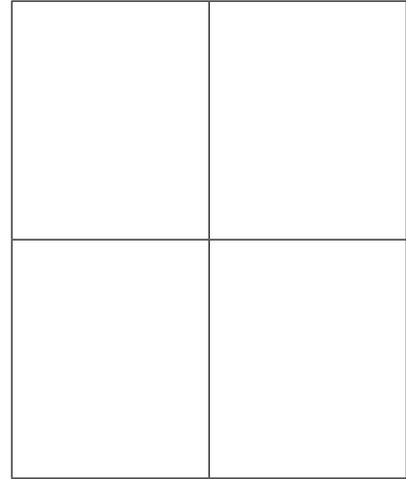
Kansas Sodbuster \_\_\_\_\_

# Farm Profit Sheet

YEAR 18 \_\_\_\_\_

- Always subtract the LIVING and FREIGHT costs before “planting.”
- Plant crops and raise livestock in units of 5 and 10.
- Livestock limitations: 50 head each, except chickens: 200.
- Diversify your crops and animals.
- Plant no more than 160 acres total (livestock excluded—less than 1 acre).
- Divide your land and label crops on the rectangle provided at right.

160 Acres



40 Acres = 1/4 Section

Original / Remaining Amt.      Living & Freight Costs      Capital Investment

\$  - \$  = \$

CROP	ACRES PLANTED	COST PER ACRE/ANIMAL	TOTAL COST OF CROP/ANIMAL	RETURN FACTOR	PROFIT
Winter Wheat	x	\$4	= \$	x	= \$
Corn	x	\$4	= \$	x	= \$
Sorghum	x	\$2	= \$	x	= \$
Barley	x	\$2	= \$	x	= \$
Oats	x	\$1	= \$	x	= \$
Hay	x	\$1	= \$	x	= \$
Peas	x	\$3	= \$	x	= \$
	x	\$	= \$	x	= \$

Total acres planted not to exceed 160

**Livestock**

Beef Cattle	*	x	\$8	= \$	x	= \$
Milk Cows		x	\$8	= \$	x	= \$
Hogs		x	\$3	= \$	x	= \$
Sheep		x	\$3	= \$	x	= \$
Poultry		x	\$1	= \$	x	= \$

\*Not to exceed 50 (chickens, 200)

\$   
**Total costs not to exceed year's capital investment**

**Savings = \$** \_\_\_\_\_

\$

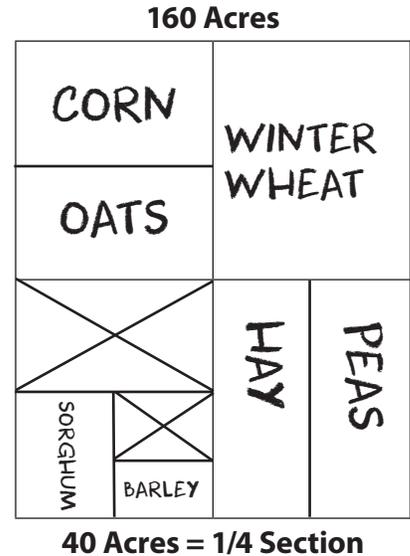
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Kansas Sodbuster Jedediah Prescott

# Farm Profit Sheet (Sample)

YEAR 1882

- Always subtract the LIVING and FREIGHT costs before “planting.”
- Plant crops and raise livestock in units of 5 and 10.
- Livestock limitations: 50 head each, except chickens: 200.
- Diversify your crops and animals.
- Plant no more than 160 acres total (livestock excluded—less than 1 acre).
- Divide your land and label crops on the rectangle provided at right.



<b>Original / Remaining Amt.</b>	-	<b>Living &amp; Freight Costs</b>	=	<b>Capital Investment</b>
\$ 2000 <sup>00</sup>		\$ 800 <sup>00</sup>		\$ 1200 <sup>00</sup>

CROP	ACRES PLANTED		COST PER ACRE/ANIMAL	TOTAL COST OF CROP/ANIMAL	RETURN FACTOR	PROFIT
Winter Wheat	40	x	\$4	= \$ 160	x	= \$
Corn	20	x	\$4	= \$ 80	x	= \$
Sorghum	10	x	\$2	= \$ 20	x	= \$
Barley	5	x	\$2	= \$ 10	x	= \$
Oats	20	x	\$1	= \$ 20	x	= \$
Hay	20	x	\$1	= \$ 20	x	= \$
Peas	20	x	\$3	= \$ 60	x	= \$
		x	\$	= \$	x	= \$

135
370  
**Total acres planted not to exceed 160**

**Livestock**

Beef Cattle	*	50	x	\$8	= \$ 400	x	= \$
Milk Cows		10	x	\$8	= \$ 80	x	= \$
Hogs		10	x	\$3	= \$ 30	x	= \$
Sheep		40	x	\$3	= \$ 120	x	= \$
Poultry		100	x	\$1	= \$ 100	x	= \$

\*Not to exceed 50 (chickens, 200)

730  
\$ 1100  
**Total costs not to exceed year's capital investment**

**Savings = \$ 100**

\$

# Annual Farm Reports

Announced by Bub Barlow, Farm Expert from Topeka's "Radio Station," K-O-R-N

## 1882

Hello out there! This is old Bub Barlow speaking to ya plow jockeys in Kansas! This is station K-O-R-N in Topeka. Old Bub's here to give you the farm report for the year just completed, 1882. Before I tell ya how yer investments turned out, listen first to some general remarks. This past year, 1882, was not exactly a banner year, but for the most part plenty of rain in eastern Kansas produced an abundant harvest of most crops except winter wheat. Can't really say why, though. Maybe because of competition overseas. Corn, sorghum, and the rest did well enough to secure a profit for farmers nearest the Republican River. Oat prices especially were high. Competition from sheep ranchers in Montana and Wyoming kept prices for sheep low. Likewise, Iowa hogs and Texas cattle were responsible for flat prices here. Poultry prices, however, went sky high to meet the demands of trendy eating habits in Chicago and Kansas City (*pause*). Okay, here are the Return Factor numbers. Listen up and write these small numbers in your factor column. Ready?

Winter Wheat	x 1
Corn	x 2
Sorghum	x 2
Barley	x 2
Oats	x 4
Hay	x 2
Peas	x 2

Now for livestock prices . . .

Beef Cattle	x 1
Milk Cows	x 1
Hogs	x 1
Sheep	x 1
Poultry	x 5!

Wow! You chicken farmers must love this! Poultry is times five! Thanks for listenin'! Old Bub signing off till next year! Bye, bye!

# 1884

It's Bub here again. Bub Barlow broadcasting from three hundred watts of radio power over station K-O-R-N in Topeka, Kansas. I'm here for the 1884 farm report. *(pause)* Mother nature conspired against you eastern Kansas farmers. As you know, we had a prolonged drought for several months. Day after day, that old sun baked the tinder-dry grasses here in Kansas. That led to some prairie fires that burned up many of the crops that didn't shrivel up and die from the blisterin' heat. Then we got some sporadic torrential rains that washed away many new seedlings. Mercy me! Some predicted the drought and the rains, too, but few could have foreseen the thousands of bison that stampeded and trampled through all the farms on the eastern side of Buffalo Creek. Thousands of acres of prime farmland were ruined by these shaggy beasts. Makes a man want to cry . . . and move back to Chicago. Some desperate farmers have been convinced by the local Grange to try planting some beans. So . . . if you feel like gambling on a new crop, beans that is, add it to your list of crops in your Farm Profit Sheet for 1886. The cost per acre is two dollars *(long pause)*.

Anyway, here is the o-fficial farm report for 1884:

Winter Wheat	x 1
Corn	x 1
Sorghum	x 1
Barley	x 2
Oats	x 1
Hay	x 2
Peas	x 2

Now for livestock prices . . .

Beef Cattle	x 1
Milk Cows	x 1
Hogs	x 2
Sheep	x 2
Poultry	x 3!

That ends the farm report for 1884. Remember, for the next year, 1886, you plow jockeys can plant a new bean crop. It's hardy food and some scientists say it packs a protein punch, as much as beef or chicken. I reckon I gotta skee-daddle! Until next time!

# 1886

HOW-DEE! I'm back with the 1886 farm report. Hope you farmers are outstanding in yer fields. Little humor there. So, are ya turnin' Kansas into the Garden of Eden like the railroads promised ya would? Enough philosophizin'. Let's hear about 1886 (*pause*). Uh-oh! As you already know from the scenes of devastation in eastern Kansas, we got hit by a plague of grasshoppers in July. These critters came like a cloud blotting out the sun. Millions of these critters stayed for days, eatin' most everythin' in sight. They poisoned the groundwater, too. After they left, we had an outbreak of "prairie fever," or typhoid. Some of ya lost a young'un or a spouse. Oddly, the corn, barley, and oat crops were almost untouched. These crops were aided by a spring rain and mild fall weather. Anyway, hogs and sheep feasted on the grasshoppers 'til they almost burst. Most of the poultry, however, were wiped out. Beef cattle and milk cows did fairly well because of a shortage of beef and dairy products in the East to meet the needs of growing city populations.

So, here's the Return Factor numbers for 1886:

Winter Wheat	x 0
Corn	x 2
Sorghum	x 1
Barley	x 3
Oats	x 4
Hay	x 0
Peas	x 0
<b>(New Crop) Beans</b>	x 1

And, except for poultry, livestock did well!

Beef Cattle	x 3
Milk Cows	x 3
Hogs	x 3
Sheep	x 3
Poultry	x 0

Saw a few of ya headin' back to the East with the banner on yer wagon: "In God We Trusted, In Kansas We Busted!" Sorry to see ya give up. Those dang bankers are foreclosin' on so many farm loans. In any event, bless ya for takin' a risk in Kansas. You showed a lot of grit. This is old Bub. See ya in 1888. Bye, bye.

# 1888

This is old Bub with the K-O-R-N farm report. Anybody still out there farmin' and sodbustin'? Hope so. I reckon I don't have good news for all you soil soldiers pushin' plows in eastern Kansas. The worst winter in the history of America's Midwest hit us throughout the winter months of 1887. Blizzards and freezin' temperatures lasted for weeks and just about wiped out all livestock except poultry, which most farmers keep inside their barns and chicken coops. Moreover, only the hardiest of crops—namely beans—survived the winter cold, so most farmers will be in a fix and have to start over with new seeds for next year. Besides the blizzards last winter, we had tornadoes last spring and a prolonged drought in the summer, sending many families hightailin' it for the East. At the same time, we had a prairie dog infestation, meanin' these varmints ate most of the tender shoots planted after the hot winds and tornadoes. Mercy me! About the only thing to cheer about is poultry prices, which shot up after last year's shortage.

Here's the farm report for 1888:

Winter Wheat	x 1
Corn	x 1
Sorghum	x 1
Barley	x 1
Oats	x 3!
Hay	x 1
Peas	x 0
Beans	x 3!

Initially, livestock prices were depressed and only a few farmers were able during the year to ship what few animals they had in railroads headed east.

Beef Cattle	x 0
Milk Cows	x 0
Hogs	x 2
Sheep	x 2
Poultry	x 4!

Bub says bye, bye until 1892!

# 1892

HOW-DEE farmers in eastern Kansas! It's 1892 and here is your farm report. Been a coon's age since I last reported to you all—four years ago to be exact. Well, a lot of change has hit our communities in Clay County since 1888. Sadly, hundreds of families went broke and left Kansas for eastern towns and cities. The struggle to farm was just too much. Those who stayed and survived have witnessed many changes. Technology finally came to Kansas. Barbed wire helped farmers keep cattle and sheep from nearby ranches away from acres of wheat, corn, and other crops. The bison herds are just about gone. Harvesting machinery, like the thresher, the corn husker, the binder, hay loader, and the reaper have all contributed to greater farm efficiency and production. Deere's new steel plow cuts the sod and turns it over. Problem is, the farmers still can't make ends meet. As we see it, it's the dang railroad people, the speculators, and the distributors who gouge the farmers. It's also a competitive world market now. The Grange has certainly helped farm people by setting up cooperatives and organizing them into local chapters. However, farmers now seem ripe for revolt. Since the early 1880s, desperate farmers have turned political by joining the Populist, or People's Party. General James B. Weaver will be their candidate for president in November. So, what is new down on the farm? Let's go over the last year's farm report for 1892. Because the winter of 1886–1887 killed off so many head of livestock, there was a shortage and that increased demand; so prices rose. Some crops did well, some did not because of dry winds and disease. All in all, the years from 1888 to 1892 saw big changes in the Midwest and a roller coaster ride for most farmers in eastern Kansas.

Here's the Return Factor numbers:

Winter Wheat	x 3
Corn	x 2
Sorghum	x 2
Barley	x 1
Oats	x 3
Hay	x 1
Peas	x 1
Beans	x 2

And the best news comes for livestock owners . . .

Beef Cattle	x 3
Milk Cows	x 3
Hogs	x 1
Sheep	x 1
Poultry	x 2

Well that's it! For five separate years over a decade, you have experienced life as a Kansas sodbuster. You "saw the elephant" up close! It is now time to find out which farmers made the most profit. Keep on plowin', plantin', and producin'! 'Til next time, this is old Bub Barlow of K-O-R-N saying . . . bye, bye to all you farmers outstanding in your fields!

# Postscript

Struggling to survive, and fed up with the harsh climate, many farmers gave up and retreated to less extreme conditions in Missouri, Ohio, and Illinois. Most stayed and continued to face the challenges of nature and make enough profit from their wheat and corn yields. Perhaps the sod house itself seems an apt metaphor for farm life, an unforgiving existence while making necessary adaptations to survive the prairie's environment.

Beyond the weather's harshness and the occasional visits from destructive critters, the farmers who remained also had to contend with new and complex problems that were emerging from the economy of the Industrial Age. Few farmers—looked upon by city dwellers now as hayseeds, rubes, hicks, and rustics—really understood the complexity of what seemed to them simple reasons for their own economic woes. Clearly, because of new farm machinery, farmers were producing surpluses. In truth, farmers were producing more food than people could afford to eat. Plus, they were competing on a world market, especially after 1870. When supply outstrips demand, prices fall. Simple Economics 101.

All this misery was compounded by the high costs of running their farms. To make matters worse, farm families continued to get deeper into debt, borrowing money from local banks to mortgage their land, houses, barns, and stock. Falling prices for foodstuffs made it worse. To avoid financial ruin, farmers increased their mortgage debt by borrowing even more money. Most farmers blamed their troubles on the shortage of money and spent the next several years actively, in protest, trying to convince the U.S. government to increase the amount of money in circulation.

On a personal level, farmers of this era blamed much of their misfortune on the so-called distributors, who bought the produce and livestock and sold it all to wholesalers: people like brokers, grain-elevator operators, and stockyard owners. Farmers reserved the greatest hatred for the railroad companies. Thinking that competition between railroad lines would keep freight rates low, the farmers found the opposite to be true: It actually cost farmers more to ship goods east, especially on short hauls. Moreover, railroads somehow evaded most regulations set by the government or pressured legislators to repeal laws.

What could they do about their situation? Faced with financial ruin, farmers soon got organized and in large numbers joined the Grange. Promoting social gatherings among neighbors and advancing education over a political agenda, the Grange also helped set up cooperative associations to bypass gouging distributors, allowing farmers to sell their goods directly to larger city markets.

When the Grange seemed inadequate to solve or minimize their problems, farmers became more politically active by supporting the Greenback Party and the Farmers' Alliance. Greenbackers wanted "cheaper" money and the free and unlimited coinage of silver. Because the United States was at the time on the gold standard, and eastern bankers and those in big business favored the gold standard, national policy continued to support an economy backed by gold.

At the same time, farmers—fired up by a new militant spirit—heeded the passionate voices of activists like Mary Elizabeth Lease (“Raise less corn and more hell!”), Ignatius Donnelly, and “Sockless” Jerry Simpson, who attacked the “conspiratorial money power” in the eastern cities and Wall Street. Eventually, pro-farmer organizations backed presidential candidates. In 1892, they supported James B. Weaver, the Populist Party candidate, who received over a million votes in a losing effort to Democrat Grover Cleveland. William Jennings Bryan was their savior in 1896, especially after Bryan’s inspiring “cross of gold” speech at the Democratic convention that year. Bryan’s electrifying words stirred farmers but didn’t generate enough votes to beat Republican nominee William McKinley. As a result, the issues of free silver and a cheap money policy were dead, populism faded, and the farmers’ crusade lay in rubble. Some of the populists’ goals, however, lived on for a very short time in the platform of the Progressive Party, and later many of their goals were legislated into law by Democrats in the twentieth century.

What of the individual farmer? Today, he and his fellow plow jockeys still farm the Great Plains, with truck, bailer, and reaper rather than horse and plow. These hardy souls still face major problems, including a competitive world market, the Dust Bowl’s devastating legacy from the 1930s, and pressure to get bought out by huge farm conglomerates like Cargill or Monsanto. Fortunately, the legacy of the tough independent farmer survives in several other ways, too: The still quiet, resilient strength of midwesterners from Iowa, Nebraska, the Dakotas, Minnesota, and Kansas survives in the great works of “farmer fiction” skillfully rendered in the talented works of Willa Cather, Hamlin Garland, and O. E. Rølvaag.

One could say that, compared to their ancestors of the 1865–1900 years, the lives of today’s farmers have improved greatly. Mostly, these lords of the land have learned, like earlier farmers, to live with—and adapt to—nature’s fickle and capricious weather, be it storms, drought, hot and cold winds, or blizzards. Destructive grasshoppers, like the buffalo and sod house, appear to be relics of the nineteenth century. The land is still there, the “Great” Plains, still battered by generations of farmers plowing, growing, and harvesting the nation’s food supply, all the while trying to transform, like the sodbusters of old, the land from a wilderness “sea of grass” into a veritable garden.

# Historical Investigation Activity

## *Sodbusting in Kansas (1882–1892)*

By Bill Lacey

### Focus Question

How did the experience of farming on the Great Plains produce more independent, self-reliant women?

### Materials Needed for This Historical Investigation

- **Documents A–I**—*class set*
- **Points to Ponder Response Sheet**—*class set*

### Lesson Plan

#### 1. Getting Started

- Ask students, “What do you imagine life was like on the Great Plains for farm families in the 1865–1900 era?” Write responses on the board as spokes emanating from a “hub” and discuss those responses.
- To motivate, show a brief video of farmers on the Great Plains, and/or discuss what farm life in the United States might be like today. How different was farm life then from farm life today in the twenty-first century?

#### 2. Backstory to Use as Instruction

- To early explorers and travelers, the interior of America—the Great Plains—appeared to be an arid wasteland, the “Great American Desert,” unfit for habitation and cultivation. In truth, it was a sea of grass. Unfortunately, this early perception of a barren land led travelers to leapfrog over the prairies to seek homesteads in the more fertile valleys in Oregon and California. For this reason, the Great Plains remained relatively unsettled until after the Civil War.
- Once settlers were there—and they came from Europe as well as from Missouri, Ohio, and Pennsylvania—their dreams of being lords of the land were overwhelmed by incredible hardships: enduring the multiple problems of drought, a blistering unrelenting sun, torrential rains, frigid winter blizzards, and being visited on rare occasion by critters like grasshoppers and locusts in biblical proportions, so thick they blackened the skies and left in their wake a devastated landscape.
- Weather and critters aside, there was a farm to run, seeds to plant, crops to harvest, animals to feed and butcher, and children to raise—along

## Sodbusting in Kansas: 1882–1892

### Historical Investigation Activity

with selling and shipping produce and livestock. It was never-ending toil and it fell on men and women alike. A farmer's wife then had her own chores to complete, often on a daily, or, at least, a weekly basis: cooking, washing clothes, tending to a garden, and trying to keep her sod house "clean and tidy." Add to all this the loneliness and isolation, especially if her children were away at a community school and her husband was out in the fields or in town. Alone during long days, she was prone to depression, visits from potentially unfriendly Native Americans, or, as reported by one woman, wolves trying to get in through the front door.

- Interestingly, some of these remarkably hardy frontier women were pioneers in another sense. Some research suggests many of them seized opportunities to contribute to frontier society as entrepreneurs, teachers, journalists, and missionaries to the Indians. Some even managed, over and above their endless farm chores, to become real estate agents, inventors, doctors, and lawyers. Moreover, a small cadre of assertive women worked tirelessly to achieve something even their sisters back East didn't have at the time: equality before the law and the vote (suffrage). In this regard, some western states (notably Wyoming, Idaho, and Kansas) were far ahead in granting basic rights to women.
3. Say, "Some questions, however, remain: Why and how did women of the Great Plains and Rocky Mountain West lead the way in obtaining women's suffrage? What were the conditions in western society that were different enough to allow women to secure certain rights and be treated equally as men's partners? That's what we'll explore today as we analyze the documents from the farmer's frontier, from 1865 to 1900."
  4. Ask students, "From this backstory and in your opinion, before we look at the documents, why were women in the west granted more equality and voting rights than their eastern sisters? Why did this phenomenon happen on the Great Plains first?"
  5. Pass out the **Points to Ponder Response Sheet** and direct students to write down their responses to question #1. Allow five minutes for students to write before you discuss what they have written, giving you a tentative hypothesis.
  6. Then say, "Our working hypothesis seems to be . . ."
  7. Pass out the package of **Documents A–I** and explain what students are to do.
  8. Allow forty to fifty minutes for students (perhaps in pairs or trios) to read and analyze the documents and fill out the **Points to Ponder Response Sheet**. Perhaps you or a student should read aloud the first one or two documents and discuss the gist of each. Remind students to work carefully, read thoroughly, and write responses clearly.

Name \_\_\_\_\_ Date: \_\_\_\_\_

# Points to Ponder Response Sheet

**Focus Question:** How did the experience of farming on the Great Plains produce more independent, self-reliant women?

1. I think women of the west—notably the Great Plains—were granted equality and voting rights before their sisters in the East because . . .

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2. **Document A:** What is the woman doing?

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Describe her surroundings.

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What seems to be missing that would help sustain life and make life easier?

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Describe her face and demeanor.

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What does this painting tell you about prairie life and specifically the role of women?

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Why do you suppose Dunn painted this particular work?

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3. **Document B:** What is this document?

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Where and when was it recorded?

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Who was given this quarter section (160 acres) of land?

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Why was this not a typical transaction?

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4. **Document C:** Describe this picture.

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What words come to mind when you think about a typical day in this woman’s life?

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5. **Document D:** Who wrote this passage?

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Why would he write it?

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In ten words, summarize the paragraph.

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6. **Documents E and F:** Summarize in ten words what each woman has written.

Document E: \_\_\_\_\_

Document F: \_\_\_\_\_

How would you describe their tone or attitude?

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7. **Document G**

**Excerpts 1 and 3:** What keywords or phrases highlight these two excerpts?

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**Excerpt 2:** Describe the tone and attitude of this pioneer bride.

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**Excerpt 4:** What does this reminiscence tell us about the roles of pioneer women?

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8. **Documents H and I:** Complete the table for these two documents.

	Document H	Document I
<b>Author of Document</b>		
<b>Title of Document</b>		
<b>Year Written</b>		
<b>Main Message (Impact of Great Plains on Women)</b>		
<b>Quotes/Keywords to Make Their Claim</b>		

9. In one lengthy paragraph of about four to five sentences, answer the **Focus Question**, using references from the document packet to support your point of view.

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# Document A

## “The Homesteader’s Wife” by Harvey Dunn

Few artists/illustrators have captured the gritty life on the Great Plains like Harvey Dunn (1884–1952), who was born and raised in South Dakota. Dunn painted this particular 40” x 50” work in 1916. Like the paintings of another famous illustrator, Norman Rockwell, Dunn’s work graced the covers of *The Saturday Evening Post*, *Collier’s Weekly*, *Harper’s*, and *Scribner’s*.



Image Source: *The Homesteader’s Wife*. By Harvey Dunn, 1916, South Dakota Art Museum, Brookings, SD.

# Document B

## A Sodbuster Registers a Claim

Interestingly, the landmark Homestead Act of 1862 boldly enticed women—single and widowed—and men to go west with equal opportunity and settle on the Great Plains.

(4-405 a.)

**THE UNITED STATES OF AMERICA,**  
To all to whom these presents shall come, Greeting:

Homestead Certificate No. 1980  
Application 5-240

OF THE LAND OFFICE at Helena Montana }  
 Whereas There has been deposited in the GENERAL LAND OFFICE of the United States a CERTIFICATE OF THE REGISTER  
 OF THE LAND OFFICE at Helena Montana whereby it appears that, pursuant  
 to the Act of Congress approved 20th May, 1862, "To secure Homesteads to Actual Settlers on the Public Domain," and the acts supplemental thereto, the claim of  
Bridget Lannen has been established and duly consummated, in conformity to law, for the  
South West quarter of the South West quarter and the Lots numbered two, three  
and six of Section fourteen in Township eleven North of Range fourteen  
West of Montana Meridian in Montana containing one hundred  
and fifty-seven acres and eighty-eight hundredths of an acre

according to the OFFICIAL PLAT of the Survey of the said Land, returned to the GENERAL LAND OFFICE by the SURVEYOR GENERAL:

Now know ye, That there is, therefore, granted by the United States unto the said Bridget Lannen  
 the tract of Land above described: To have and to hold the said tract of Land, with the appurtenances  
 thereof, unto the said Bridget Lannen and to her  
 heirs and assigns forever; subject to any vested and accrued water rights for mining, agricultural, manufacturing, or other purposes, and rights to ditches and reservoirs used in  
 connection with such water rights, as may be recognized and acknowledged by the local customs, laws, and decisions of courts, and also subject to the right of the proprietor of  
 a vein or lode to extract and remove his ore therefrom, should the same be found to penetrate or intersect the premises hereby granted, as provided by law. And there is  
 reserved from the lands hereby granted, a right of way thereon for ditches or canals constructed by the authority of the United States.

In testimony whereof I, Benjamin Harrison, PRESIDENT OF THE UNITED STATES OF AMERICA, have caused these letters to be  
 signed and the seal of the GENERAL LAND OFFICE to be hereunto affixed.

GIVEN under my hand, at the CITY OF WASHINGTON, the twentieth day of July, in the year of our Lord one thousand eight  
 hundred and ninety two, and of the Independence of the United States the one hundred and seventeenth

BY THE PRESIDENT: Benjamin Harrison  
 By M. M. Evans Secretary.  
D. A. Roberts  
 Recorder of the General Land Office.

Recorded, Vol. F. A., Page 107  
 2411 b 33 m

Image Source: United States General Land Office, "Bridget Lannen, Homestead Certificate," Archives & Special Collections—Maureen and Mike Mansfield Library, accessed April 13, 2017, <http://content.lib.umt.edu/omeka/items/show/111>.

# Document C

## “Home Sweet Home”—A Sod House Family



*Image Source:* “John Bakken Sod House, Milton, North Dakota.” By John McCarthy, c. 1895, North Dakota State University Institute for Regional Studies, reproduction number 120mm-0144 copy neg. 2028.061.

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# Document D

## Homesteading by Single Women and Widows

*It perhaps ought to be stated here, for the benefit of widows and single women over twenty-one years of age, that they are as much entitled to homesteads as men, and the women of Dakota generally avail themselves of the privilege. We can point you to young women in Dakota who carry on quite a stroke of farming now, who came here penniless a few years ago. One wom[a]n has now three hundred and twenty acres of land, paid for from her wages as servant girl, at \$4.00 per week. It is the investment of what she has saved from her wages in the last two years. We, of Dakota, believe in Women's Rights, especially the right to take a homestead and manage it to their own liking.*

Source: James S. Foster, *Outlines of History of the Territory of Dakota, and Emigrant's Guide to the Free Lands of the Northwest* (Yankton, Dakota Territory: M'Intyre & Foster, 1870).

# Document E

## Does Hard Work Result in Independent Women?

Elinore Pruitt Stewart's *Letters of a Woman Homesteader*, acclaimed when it was published in 1914 and reissued in the 1970s, was the basis for the popular indie film *Heartland* (1979), a gritty but honest portrait of a farm wife in Sweetwater County, Wyoming.

*[A]ny woman who can stand her own company, can see the beauty of the sunset, loves growing things, and is willing to put in as much time at careful labor as she does over the washtub, will certainly succeed; will have independence, plenty to eat all the time, and a home of her own in the end.*

Source: Elinore Pruitt Stewart, *Letters of a Woman Homesteader* (Boston: Houghton Mifflin, 1914).

# Document F

## A Farmer's Wife, 1900

Secretly desiring a career as a writer, this anonymous woman's description of life as a farmer's wife provides insight into her particular situation in 1900.

No man can run a farm without some one to help him, and in this case I have always been called upon and expected to help do anything that a man would be expected to do; I began this when we were first married, when there were few household duties and no reasonable excuse for refusing to help.

I was reared on a farm, was healthy and strong, was ambitious, and the work was not disagreeable, and having no children for the first six years of married life, the habit of going whenever asked to became firmly fixed, and he had no thought of hiring a man to help him, since I could do anything for which he needed help.

Source: Anonymous, "One Farmer's Wife," *The Independent* (February 9, 1905).

# Document G

## Reminiscences of Kansas Farm Life

In 1975, author Joanna L. Stratton found autobiographical manuscripts in the attic of her grandmother's home. These were written by hundreds of pioneer women, collected by Stratton's great-grandmother, Lilla Day Monroe. Day was a well-known suffragette, lawyer, and publisher.

### Excerpt 1: Text by Joanna L. Stratton

*To the pioneer woman, home and hearth meant work loads that were heavier than ever. And yet that work was the work of survival. In its isolation, the pioneer family existed as a self-sufficient unit that took pride in its ability to provide for itself and persevere in the face of hardship. Men and women worked together as partners, combining their strengths and talents to provide food and clothing for themselves and their children. As a result, women found themselves on a far more equal footing with their spouses.*

### Excerpt 2: Reminiscence of a Pioneer Bride

*I already had ideas of my own about the husband being the head of the family. I had taken the precaution to sound him on "obey" in the marriage pact and found he did not approve of the term. Approval or no approval, that word "obey" would have to be left out. I had served my time of tutelage to my parents as all children are supposed to. I was a woman now and capable of being the other half of the head of the family. His word and my word would have equal strength. God had endowed me with reason and understanding and a sense of responsibility. I was going west to try out as a wife and homemaker. How well I have succeeded I leave to those who know me best to tell.*

### Excerpt 3: Reminiscence of Clara Hildebrand

*Pioneer life was not all hardship and danger. The outstanding fact is that the environment was such as to bring out and develop the dominant qualities of individual character. Kansas women of that day learned at an early age to depend upon themselves—to do whatever work there was to be done, and to face danger when it must be faced, as calmly as they were able. And there was the compensation of contact with the great new West—a new world—theirs to develop from wild prairie to comfortable homes.*

## Excerpt 4: Reminiscence of Clara Hildebrand

*The pioneer Kansas woman shared her husband's work and interest in the garden, the orchard, the crops and animals of the farm; she worked in the garden and gathered its products. She knew just how each vineyard or tree in the young orchard was coming in. She shared in the hopes for a bountiful crop as the field things sprouted and grew green and tall. Did a horse, dog or other farm animal get badly gored, cut or wounded, hers was the task to cleanse the wound and take the stitches that drew the torn edges together.*

Source: All excerpts from Joanna L. Stratton, *Pioneer Women: Voices from the Kansas Frontier* (New York: Simon and Schuster, 1981).

# Document H

## The Great Plains' Impact on Women

For years, Professor Christine Stansell has written about the impact of the Great Plains environment on women. The excerpt below paints an honest and revealing portrait of frontier women based on Stansell's research. "The West," she writes, "had become a man's world . . ." and "women were often invisible."

*[W]ithout a doubt the burden of the adverse conditions of Plains life—the aridity, treelessness, heat, perpetual wind, and deadening cold—fell upon the women. Almost without exception, others concur: "although the life of the frontier farmer was difficult special sympathy should go to his wife" . . . "it is certain that many stayed until the prairie broke them in spirit or body while others fled from the monotonous terror of it." An observer . . . found life there to be "peculiarly severe upon women and oxen. . . ."*

*In most respects, the patterns of life rarely accommodated women's needs. Plains society paid little mind to women, yet women were essential, not incidental, to its functioning. Without female labor, cash-crop agriculture could never have developed. A man could not farm alone, and hired help was almost impossible to come by. Ordinarily, a farmer could count only on his wife and children as extra hands. On the homestead, women's responsibilities as a farmhand, not as a home-maker or a mother, were of first priority. Women still cooked, sewed, and washed, but they also herded livestock and toled water for irrigation.*

Source: Christine Stansell, "Women of the Great Plains 1865–1890," *Women's Studies* 4 (1976), as reprinted in Larry Madaras and James M. SoRelle, eds., *Taking Sides: Clashing Views on Controversial Issues in American History, Vol. II Reconstruction to the Present* (Guilford, CT: Dushkin, 1995).

# Document I

## Did the West Produce More Self-Reliant Women?

Like historian Christine Stansell (see **Document H**), Sandra Myres has also written extensively on western women. Unlike Professor Stansell, Myres interprets the evidence differently. Both scholars used diaries, journals, letters, and reminiscences to make their claims.

*[S]everal radical feminist authors have maintained that the West exerted a regressive rather than a progressive influence on women's lives. These authors contended that women on the frontiers were forced into unfamiliar, demeaning roles, and . . . their work as virtual hired hands prevented them either from returning to older, more familiar roles in the social structure or from creating positive new roles. . . .*

*Yet . . . there is clear evidence that Western women did not confine themselves to purely traditional domestic and community concerns. It is true that most Western women were not revolutionary. . . . They did enlarge the scope of woman's place, however, and countered prevailing Eastern arguments about woman's sphere and the cult of true womanhood. . . . Western women were employed in a number of economic activities, and some of them engaged in new fields of endeavor outside what was considered their competency, skills, or proper sphere. . . .*

*. . . [I]n ranch operations, they tended to become increasingly self-reliant and independent. . . . This opinion was shared by a number of outside observers. The English visitor Anthony Trollope wrote in 1862 that ranchwomen were "sharp as nails and just as hard." They were rarely obedient to their menfolk, he reported, and "they know much more than they ought to. If Eve had been a ranchwoman, she would never have tempted Adam with an apple. She would have ordered him to make his [own] meal."*

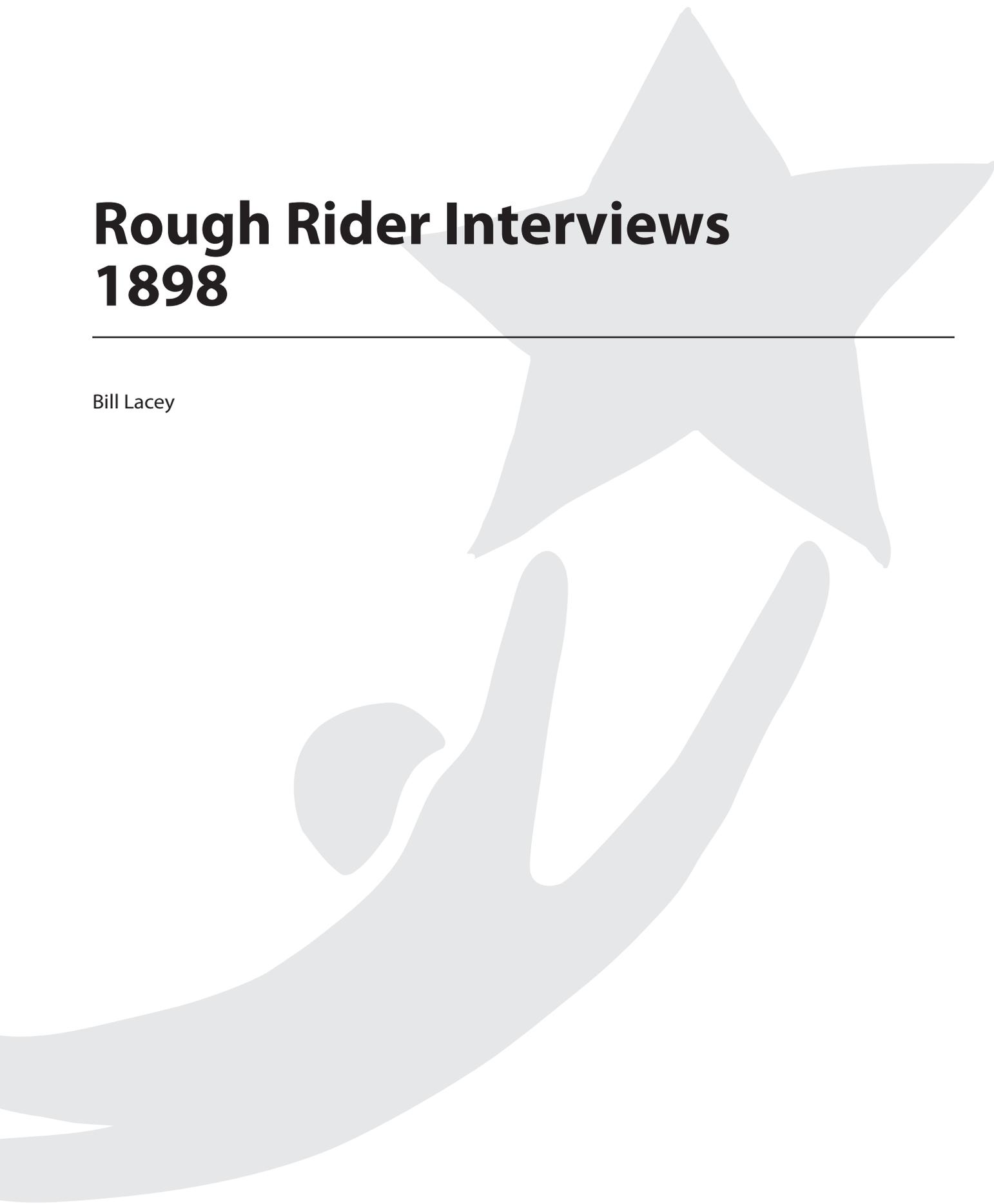
Source: Sandra L. Myres, *Westering Women and the Frontier Experience, 1800–1915* (Albuquerque: University of New Mexico Press, 1982).



# **Rough Rider Interviews 1898**

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Bill Lacey



## Lesson Plan

### Overview

This Activator will directly involve your students as they role-play both “yellow journalists” caught up in war fever against Spain and candidates to become soldiers for Colonel Theodore Roosevelt’s Rough Riders. All this takes place in the spring of 1898, when the United States was preparing for what would become a “splendid, little war.” Eventually this Spanish-American War forced the United States to face issues of imperialism and thrust it upon the world stage with new responsibilities.

### Setup

#### 1. Duplication

- **Background Essay**—*class set*
- **Postscript**—*class set*
- **Yellow Journalism**—*one copy* for each group
- **Application for U.S. Voluntary Cavalry**—*class set*
- **Interviewer’s Sheet**—enough copies for the students who will role-play interviewers (4–5 per class)
- **Rough Rider Evaluation Form**—*8–10 copies* for each interviewer
- **President McKinley’s Speech to Rough Rider Candidates**—*one copy* for the student playing this part
- **Roosevelt’s Speech to His Rough Riders**—*one copy* for the student playing this part

2. **Schematic, props, costumes:** Study the **Schematics** carefully. Find and bring into your classroom any props or costume pieces that will help create the setting and mood of an America feverish over war with Spain. Some banners can be made to enhance the ambiance of the Activator. *Example: “Remember the Maine! To hell with Spain!”*

#### 3. Roles

- a. **Phase 1:** Students work in groups to create eye-catching headlines. There are a few roles to fill: one student to lead each group, one to play McKinley, and one student from each group to mimic a turn-of-the-century newsboy selling papers.

#### Teaching tip

To have adequate time for all interviews during one class period, hand out the **Application** sheets a day or two before the interview day. Then the only tasks for candidates to complete while they wait for their interviews is the motto and logo activity.



#### Teaching tip

It is your choice when to have President McKinley deliver his speech: either at the end of Phase 1 or at the beginning of Phase 2 (after the classroom has been rearranged to accommodate the interviews).



- b. **Phase 2:** During this interview phase, at least four students role-play interviewers; a final student role-plays Roosevelt, who leads the chosen Rough Riders in an oath after his final speech.

## Directions

- To augment what is contained in your history textbook, either hand out the **Background Essay** as homework the day before or pass it out now. If you have given it as homework, conduct an informal discussion of the main points brought out in the essay. If you are passing it out now, read the essay aloud to the students as they read with you, pausing to explain the main points. (This choice is, of course, determined by the reading level and age of your students.)
- Display the **Schematics**, explain the phases, assign roles for each phase, and distribute handouts to these students.
- Rearrange the classroom into groups of four to accommodate action for Phase 1. Divide students into these groups, making sure at least one of the four in each group has the leadership skills necessary to guide the rest of their group.
- If you did not hand out the **Background Essay** earlier, pass out at least one copy to each group. Explain that each group will create a sensational news story and dramatic headline for one paragraph in the essay. Assign one paragraph to each group. To “prime the pump” and illustrate what you want from them, read aloud the first paragraph of the **Background Essay**. Then ask students to come up with a sensational headline for it. *Example: “Gay Nineties Powers U.S. Empire Quest.”* Then pass out the **Yellow Journalism** sheet (one per group). Make sure students read and follow the directions.
- After all groups have finished, select one in each group to mimic a turn-of-the-century newsboy. (Possibly supply a large bag and a hat to use as costume/props.) Have these students bark out the headline to lure potential buyers as they wander around the classroom. Award some classroom points for the best newsboy characterization.
- Flow into the next phase by having all students stand as President McKinley enters the room. Play “Hail to the Chief.” Introduce McKinley, who delivers his short speech on the situation in Cuba and the need for brave soldiers to go there. Then, have students rearrange the classroom to resemble the **Schematic**. If you have voting booths or something similar, use these as partitions to separate the waiting room from the interviewing rooms.



### Teaching tip

Consider bringing into class some tabloid newspapers found in today's supermarkets to point out contemporary sensationalistic headlines.



### Teaching tip

#### Model for students:

“Hurry . . . hurry . . . get your newspaper . . . ‘Gay Nineties Powers U.S. Empire Quest!’”

## Rough Rider Interviews: 1898

### Lesson Plan

#### Teaching tip



See the **Schematic**: Students are awaiting interviews sitting at desks or tables with a card in front of them with a number you have written on it. (If you have twenty candidates, you will have written numbers 1–20 on separate cards.) To create a military feeling for waiting candidates, you can have the interviewers call out the numbers in random order. Each number is then written on a **Rough Rider Evaluation Form** just before the interview begins.

#### Teaching tip



Make sure that interviewers realize they are to fill out a **Rough Rider Evaluation Form** after the candidate has left and before randomly calling out a number for the next interviewee. (Forms should be filled out in about thirty seconds.)

7. Select four to six students to be interviewers. Determine the number by how many students you have in class. One interviewer should not have more than six to seven candidates to interview. Give each interviewer a copy of the **Interviewer's Sheet**. Tell them to study the handout and review the questions they will ask each candidate. Send them behind the partition. Also distribute **Rough Rider Evaluation Forms** to cover their caseloads.
8. While interviewers are studying their **Interviewer's Sheet**, gather the Rough Rider candidates (the remainder of your class) in the middle of the room. Tell them that they all want to become Rough Riders and the purpose of this phase is for them is to impress the interviewer so that they are selected. Give them each an **Application for First U.S. Voluntary Cavalry** and have them go off by themselves. They should fill out the form and think about questions the interviewers might ask them.
9. Before interviewers begin calling in the "men," tell Rough Rider candidates to do one more task as they await their interview: Make up a slogan/motto and a symbol/logo for this illustrious Rough Rider cavalry unit. A clever slogan and symbol could be the difference between being selected and rejected. (This task will keep candidates busy while others are being interviewed.)
10. Make sure interviewers and interviewees are clear on what will happen. When they are ready, *randomly* place on each desk numbered 5" x 7" cards.
11. Proceed until all interviews have been completed. Then have interviewers announce, by numbers, those who passed the interviews to become Rough Riders. Next, have the new cadre of cavalry stand and have Colonel Roosevelt give his short speech and administer the Rough Rider oath. (*Of course, the student playing Roosevelt is wearing spectacles, a cavalry hat, and a bushy mustache!*)
12. "Teddy" leads a "charge" through the classroom door into the hall or onto the campus. As Roosevelt and his Rough Riders charge, they shout the following chant over and over: **Roosevelt: "Remember the Maine!"**  
**Rough Riders: "To hell with Spain!"**

This Activator affords you several options from which to choose. Keep in mind that you may select any combination of these, or choose to implement just one phase:

**Option A:** This option follows the directions above and includes both phases over one or two days.

**Option B:** Students complete Phases 1 and 2. First they work in cooperative groups; they proceed through the headline-creating tasks. (Each group

does all paragraphs from the **Background Essay**.) Then one in each group interviews the others in the group, one at a time, before selecting one or two of the best candidates.

**Option C:** Focus on Phase 2, the Rough Rider interviews. If time is limited and you want to give all students a chance to sharpen real-world social skills, this phase can illustrate what is needed to be successful while interviewing to get a job. Implementing this phase can help students as future employment seekers.

## Debriefing

Decide whether you wish to use a short or long debriefing. Here are possible ways to make meaningful what happened when Americans caught war fever in 1898:

### Short Debriefing

1. Pass out the **Postscript**. Either read this to your students or summarize the main points of each paragraph before going on.
2. Ask students to discuss what they learned and what they felt as they played their roles.
3. Consider having students write a Learning Log entry following this short debriefing.

### Long Debriefing

Use one or more of the following debriefing activities:

1. Pass out the **Postscript**. Either read this to your students or summarize the main points of each paragraph before going on.
2. Have students make up a recruiting poster, specifically, with Rough Rider material in mind. What four or five qualities would a Rough Rider need?
3. Have students create a perfect biography of a Rough Rider candidate now that they've gone through an interview and filled out an application.
4. What kinds of specific training would they put Rough Riders through to make them victorious in Cuba?
5. **Discuss:** Why was it so important for Roosevelt to get cowboys, miners, and Ivy League athletes to constitute his Rough Rider unit? What attributes would these varying types possess?

6. Have students create a song that sums up a Rough Rider and the task ahead of him.
7. The average U.S. soldier in the Spanish-American War was twenty-four, about five feet, eight inches tall, about 150 pounds, poor, and, surprisingly, from the city. Using a graph format, compare this war's average soldier with soldiers who fought in the Vietnam War.

**Average Soldier**

	<b>Spanish American</b>	<b>Vietnam</b>
Age		19–21
Height		5'10"
Weight		175
Origins		Rural South
Probably died of		

The oldest survivor of the Spanish-American war was Nathan Cook, who died in September 1992, at age 106. If you had the chance to interview him before he passed away, what questions would you have ask him?

8. Many have believed that this war could be called "William Randolph Hearst's War" because of the influence the yellow press had on war fever leading to McKinley's request for a declaration of war. Do the print or television media have the power and influence today to accomplish what Hearst and Joseph Pulitzer seemingly did in 1898? Discuss.
9. Show one of the recommended videos in the **Visual history** section.
10. In one such video, "TR and His Times," an episode of the documentary series *A Walk through the 20<sup>th</sup> Century*, narrator Bill Moyers, as he interviews historian David McCullough, finds out that during Roosevelt's "crowded hour," he and his Rough Riders charged up Kettle Hill, not San Juan Hill. **Ask students:** Why do you suppose this inaccurate fact was allowed to stand in 1898 and through the years since?
11. Consider having your students write a Learning Log entry based on the role(s) they played in this Activator.

**Teaching tip**



Encourage students to bring in copies of today's tabloid newspapers sold in supermarkets. Have them read aloud some headlines. Then discuss this question: Does private enterprise media have responsibilities in a democratic society?

Write a Learning Log ...

Learning Log	
●	My group had a little trouble writing a smashing headline of "yellow journalism" until Angie suggested we talk about the plight of children being killed. We did OK with that. But what most interested me was my getting to be an interviewer. I really liked asking Bill, Mary, and Vince why they thought they wanted to be Rough Riders. What really surprised me was how much they wrapped some of the yellow journalism around themselves so that they were fired up to go to war. They really wanted to die for Cubans and the men who went down on the Maine. I sense there's a real difference between then and now. We aren't as patriotic now as ...
●	



**Teaching tip**

Sometimes writing a Learning Log can cause a student to speak up in class later, revealing how a participatory class is helping them learn. Never underestimate how much students reveal about the meaning they are finding while they "write to learn" in your class.

**Resources to consult**

Berner, Brad K., ed. *The Spanish-American War: A Documentary History with Commentaries*. Madison, NJ: Fairleigh Dickinson University Press, 2014.

Brands, H. W. T. R.: *The Last Romantic*. New York: Basic Books, 1997.

Freidel, Frank. *The Splendid Little War*. Boston: Little, Brown, 1958.

Gardner, Mark Lee. *Rough Riders: Theodore Roosevelt, His Cowboy Regiment, and the Immortal Charge Up San Juan Hill*. New York: HarperCollins, 2016.

Jones, V. C. "Before the Colors Fade: Last of the Rough Riders." *American Heritage* 20, no. 5 (August 1969): 42–43, 93–95.

Leech, Margaret. *In the Days of McKinley*. New York: Harper & Brothers, 1959.

Leuchtenburg, William E. "The Needless War with Spain." *American Heritage* 8, no. 2 (February 1957): 32–45, 95.

Maddox, Robert J. "Teddy Roosevelt and the Rough Riders." *American History Illustrated* 12, no. 7 (November 1977): 8–19.

Morris, Edmund. *The Rise of Theodore Roosevelt*. New York: Random House, 1979.

## Rough Rider Interviews: 1898

### Lesson Plan

Roosevelt, Theodore. *The Rough Riders*. New York: P. F. Collier & Son, 1899.

Thomas, Evan. *The War Lovers: Roosevelt, Lodge, Hearst, and the Rush to Empire, 1898*. New York: Little, Brown, 2010.

Tuccille, Jerome. *The Roughest Riders: The Untold Story of the Black Soldiers in the Spanish-American War*. Chicago Review Press, 2015.

Weisberger, Bernard. *Reaching for Empire*. Vol. 8 of the Life History of the United States. New York: Time, 1964. Especially pages 126–147.

### Visual history

**Documentaries:** *A Walk through the 20th Century* episode entitled “TR and His Times” (1984, hosted and narrated by journalist Bill Moyers). If you can find it, *The Splendid Little War* was a documentary released in 1992, directed by William Styple.

**Feature film:** An excellent four-hour miniseries called *Rough Riders* came out in 1997.

# Background Essay

**Place:** New York City and Washington, D.C.

**Time:** 1898



Theodore Roosevelt (1858–1919)

## **The 1890s**

Many people, looking back from the hard times of the 1930s, often referred to the decade before the turn of the century as the “Gay Nineties.” Somewhat happy and carefree years, the 1890s also saw the conquest of the last frontier and events that signaled

that the United States might become more than a continental power stretching from ocean to ocean. In fact, the United States, by the decade’s end, would be a world power with an overseas empire.

## **Alaska**

The United States had begun its acquisition of territory when it purchased Alaska from Russia in 1867. Seeing an opportunity to gain a land rich in mineral wealth and animal resources, Secretary of State William Seward negotiated a treaty that included paying \$7.2 million for Alaska, but he received an avalanche of criticism from some Americans who called Alaska “Seward’s folly” or “Seward’s icebox.”

## **Hawaii**

The Hawaiian Islands beckoned Americans as well. When a revolution (instigated by American planters) broke out in this Pacific paradise, the United States maneuvered to annex the islands in 1898 and set up a territorial government. Hawaii was deemed important as a refueling station for a strong American Navy. In his book *The Influence*

*of Sea Power upon History*, U.S. naval officer Alfred Thayer Mahan wrote that a modern navy of steel-hulled warships was an important component of a successful foreign policy and expanding commerce, especially in the Pacific Ocean. For this to happen, Hawaii, strategically located, was vital as a U.S. port of call.

## **Cuba Libre**

Thus, by the late 1890s, the United States had the beginnings of an overseas empire. The issue, however, which transformed the United States into a full-scale world power by 1900, centered on the Caribbean island of Cuba. By 1890, Old World power Spain was losing its four-hundred-year-old empire. Cuba, Puerto Rico, the Philippines, and Guam were all Spain had left. Since the 1860s, Cubans had attempted to throw off their Spanish oppressors and gain freedom and independence. After failing to do so, many revolutionaries fled to the United States and, aided by poet José Martí, gained American sympathy. When a high tariff on sugar caused the Cuban economy to slip, a new insurrection ignited. Martí and other exiles returned to their homeland, where Martí was killed.

## **Weyler and reconcentración**

Spain tried to deal with the new uprising and the rebel’s guerrilla warfare by sending over a new governor, General Valeriano Weyler, to implement a harsh policy of reconcentración. His tough policy called for concentrating, or herding, the civilian population into detention camps or fortified towns. Appalling conditions in these camps and towns led to more than a hundred thousand deaths from starvation, disease, and neglect. For his part, Weyler earned the nickname “Butcher” and “Mad Dog” from the American press.

Image Source: Theodore Roosevelt. 1918, Baker Art Gallery.

### **“Yellow journalism”**

As the Cuban revolt and Weyler’s policy played out from 1895 to 1898, American newspapers competed with each other to expose the atrocities in Cuba and thus gain wider circulation and increased prestige. Two New York newspapers in particular vied for supremacy in that city. The *World*, published by Joseph Pulitzer, and the *Journal*, published by William Randolph Hearst, both used huge, exaggerated headlines as well as sensational and often inaccurate stories and comics to attract new readers. Each paper sent skilled reporters such as Richard Harding Davis and Stephen Crane to Cuba to cover the insurrection. Occasionally, these reporters fabricated stories to satisfy the demands of their bosses. When one reporter/artist, Frederic Remington, wired Hearst that there probably wouldn’t be a war, the publisher wired back: “You furnish the pictures and I’ll furnish the war.”

### **War fever**

After several months of a steady diet of “yellow,” or sensational, journalism, many Americans—especially the ultra-patriotic jingoists, who called for a warlike foreign policy throughout the 1890s—started pushing for a war to liberate Cubans from their Spanish masters. President William McKinley outwardly made attempts to avoid a clash of arms, but even these efforts failed. Instrumental in this failure was the publication of a letter written by the Spanish minister to the United States, Enrique Dupuy de Lôme, criticizing McKinley as a “weak bidder.” Rebels conveniently gave the letter to a press eager to drop another bombshell on the American public.

### **The Maine**

In early 1898, a riot broke out in Havana. To protect American lives, McKinley sent the battleship *Maine* to Havana harbor. Days later, on February 15, 1898, a huge explosion ripped through the warship, sank it, and killed 260

Americans who had been on board. Research on the explosion over the past century has concluded that the blast was an ill-timed accident. Frenzied by sensationalism and eager to fight for Cuban independence, Americans blamed the Spaniards.

### **Cautious McKinley**

For weeks following the sinking of the *Maine*, the United States teetered on the brink of war. The president, however, sought to calm the most rabid jingoists, such as Assistant Secretary of the Navy Theodore Roosevelt, who wanted war. McKinley proposed to mediate a cease-fire in Cuba, but he still maintained support for eventual Cuban independence. Interestingly, Spain rejected McKinley’s proposal. Despite opposition from business and religious leaders, most Americans were outraged by the long history of atrocities in Cuba and the destruction of the *Maine*. “Remember the *Maine* and to hell with Spain” became a motto. Among these people, war fever ran high. Finally, McKinley presented Spain with some final demands. Agreeing to stop the reconcentración, Spain nonetheless refused to leave the Caribbean island.

### **Become a Rough Rider!**

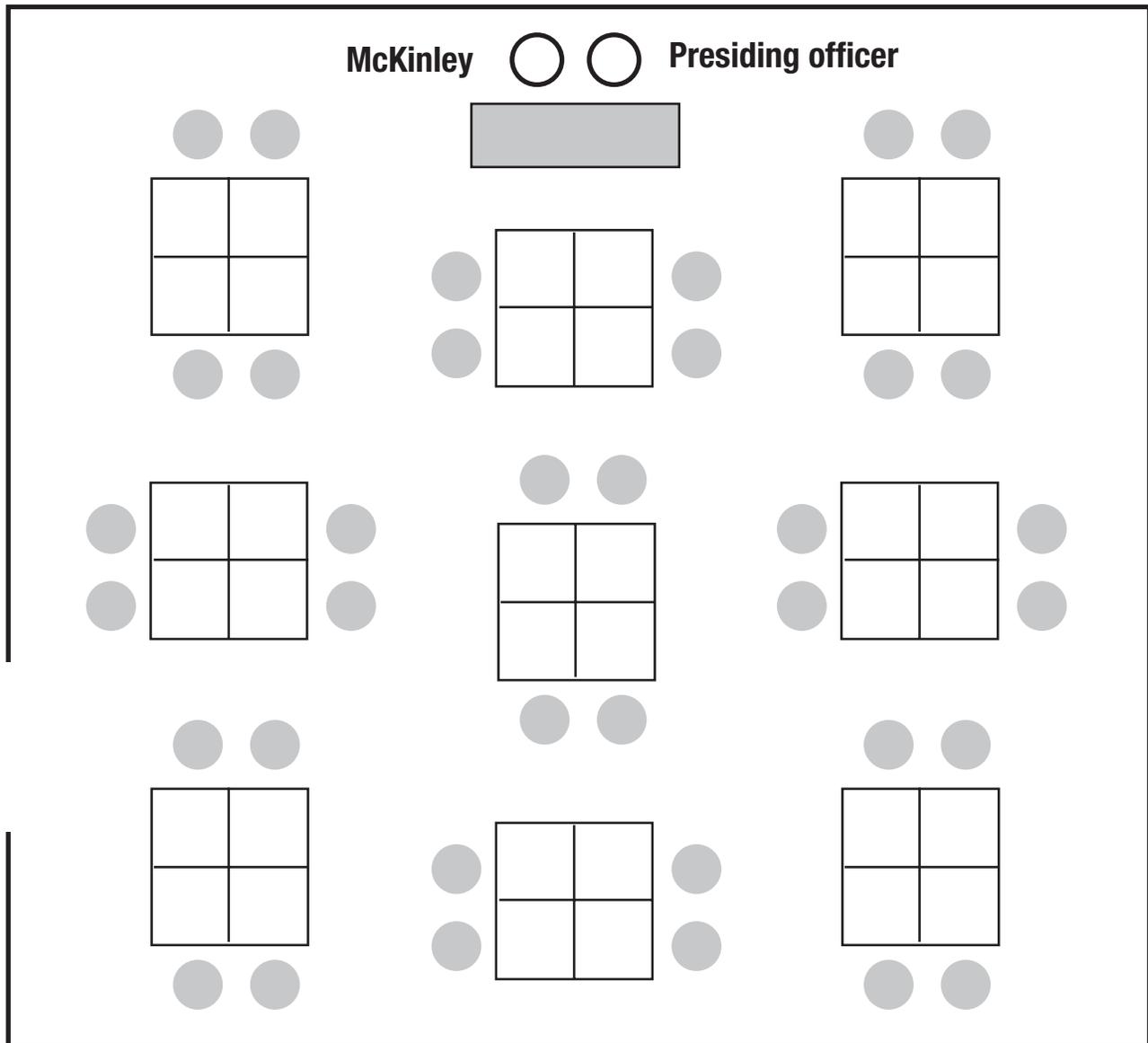
This was the situation in the second week of April 1898 when President McKinley faced his dilemma. Should he continue to pursue peace, or should he succumb to the warmongers and ask Congress for war? Now it’s time to put you in this exciting and pivotal year—1898. First, you will write some sensational headlines. Then you will be a candidate (or interviewer) as you and your classmates strive to become Rough Riders, U.S. cavalry soldiers ready and eager to follow Colonel Roosevelt to Cuba in order to fight Spaniards.

### **Good luck!**

**Attention!** Colonel Roosevelt is looking for men to become soldiers in his Rough Riders cavalry unit. Sign up today.

# Schematic

## Phase 1—Writing Headlines



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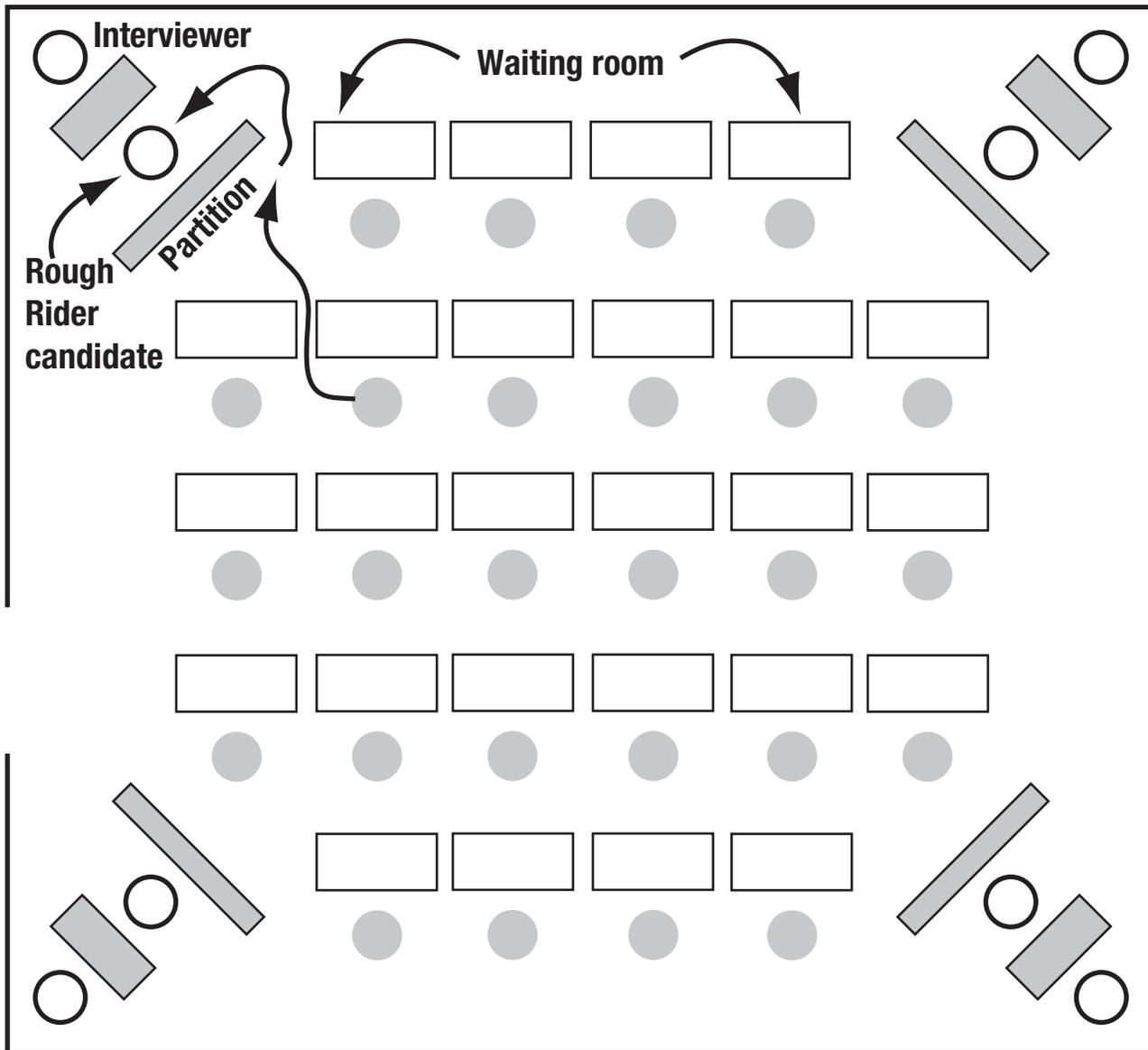
### Suggestions

- There are nine paragraphs to utilize for up to nine groups to write a brief summary and an eye-catching, exaggerated headline.
- Encourage group representatives, when called on, to hawk their headlines like 1898 "newsies."
- Select one of your most charismatic students to play the McKinley role.
- Play "Hail to the Chief" when the president arrives to speak.

### Characters needed

- President William McKinley
- A presiding officer to call on the different groups so that they can hawk their newspaper headlines after President McKinley has been introduced.

### Phase 2—Rough Rider Interviews



#### Suggestions

- The interviewers should have interpersonal skills.
- Allow some time (say five to seven minutes) for interviewers to review the questions for the candidates—at least the first ones—so the candidates have time to create their mottoes and logos.
- Have interviewers call candidates to their “offices” by number to make it feel like the impersonal military.

- Play some turn-of-the-century music: Sousa marches, ragtime, “A Hot Time in the Old Town,” etc.

#### Characters needed

- At least four interviewers (with maximum caseload of seven or eight each)
- 20–34 Rough Rider candidates
- One student to be Colonel Roosevelt, who gives the speech and oath just before the Activator ends.

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# Yellow Journalism

## Writing Sensational Headlines

So that you will understand how headlines and articles about events in Cuba were a factor in bringing the United States into war against Spain, try writing headlines in a “yellow journalism” style used by William Randolph Hearst and his rival Joseph Pulitzer. Some observers today point out that weekly newspapers found at market checkout counters still practice the sensational reporting begun in the 1890s.

## Directions

Your teacher will assign your group a section from the **Background Essay** on which to base your sensational, eye-catching headline. Some suggestions:

- Analyze these sample headlines for elements of the style you are to use.
- Work together as a group. Share ideas.
- Write out some “rough draft” headlines before your final copy.
- Once finished, let your teacher know your group is ready to have one group member stand up and use your headlines and paragraph to hawk the newspaper. This member should be as enthusiastic as a turn-of-the-century “newsie” (newsboy).

This is the front page of the *New York Journal* for February 17, 1898. Can you analyze how this front-page story was manipulating readers?

**\$50,000 REWARD.—WHO DESTROYED THE MAINE?—\$50,000 REWARD.**

EDITION FOR GREATER NEW YORK  
**NEW YORK JOURNAL**  
AND ADVERTISER

NO. 1475. PUBLISHED WEEKLY. NEW YORK, THURSDAY, FEBRUARY 17, 1898.—10 PAGES. PRICE ONE CENT.

**DESTRUCTION OF THE WAR SHIP MAINE WAS THE WORK OF AN ENEMY**

**\$50,000!**  
**\$50,000 REWARD!**  
For the Detection of the Perpetrator of the Maine Outrage!

**\$50,000!**  
Assistant Secretary Roosevelt Convinced the Explosion of the War Ship Was Not an Accident.

**\$50,000!**  
**\$50,000 REWARD!**  
For the Detection of the Perpetrator of the Maine Outrage!

The Journal Offers \$50,000 Reward for the Conviction of the Criminals Who Sent 258 American Sailors to Their Death. Naval Officers Unanimous That the Ship Was Destroyed on Purpose.

**NAVAL OFFICERS THINK THE MAINE WAS DESTROYED BY A SPANISH MINE.**

Hidden Mine or a Sunken Torpedo Believed to Have Been the Weapon Used Against the American Man-of-War—Officers and Men Tell Thrilling Stories of Being Blown Into the Air Amid a Mass of Shattered Steel and Exploding Shells—Survivors Brought to Key West Scout the Idea of Accident—Spanish Officials Protest Too Much—Our Cabinet Orders a Searching Inquiry—Journal Sends Divers to Havana to Report Upon the Condition of the Wreck.

# Application for First U.S. Voluntary Cavalry (K-Troop)

Name: \_\_\_\_\_ Today's date: May 15, 1898

Nickname: \_\_\_\_\_ Age: \_\_\_\_\_ Height: \_\_\_\_\_ Weight: \_\_\_\_\_

Date of birth: \_\_\_\_\_ Place of birth: \_\_\_\_\_

Occupation: \_\_\_\_\_ Years of experience on the job: \_\_\_\_\_

Colleges attended:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Travel experience:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Degree/major: \_\_\_\_\_

Year graduated: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Attitude toward Cuban Independence: \_\_\_\_\_

\_\_\_\_\_

Attitude toward Spaniards: \_\_\_\_\_

\_\_\_\_\_

Have you ever killed another human? Explain.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Military experience:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Experience with firearms and other weapons:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Foreign languages spoken/written: \_\_\_\_\_

Next of kin:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Describe your health:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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# President McKinley's Speech to Candidates

The following speech is adapted from McKinley's actual message to Congress in April 1898:

*(After applause)* Thank you. It becomes my duty now to address you men with regard to the grave crisis that has arisen in the relations of the United States to Spain by reason of the warfare that for more than three years has raged in the neighboring island of Cuba. As you know, since 1895 this country has seen Cuba ravaged by fire and sword. In Cuba, a once prosperous economy has been paralyzed, its fields laid waste, its mills in ruins, and its people perishing from hunger and destitution. Further, our trade has suffered; the capital invested by our citizens in Cuba has been largely lost. These events have given our government great concern.

The war in Cuba seems not to end with victory for either side, the Spanish or the Cuban insurgents. Realizing this, it appears to be my duty no less to Spain than to the Cubans to seek to bring about an immediate termination of the war. Earlier attempts to have the Spanish cease their policy of *reconcentración* have failed. I believe then that a forcible intervention of the United States as a neutral to stop the war is justifiable on rational grounds.

We need to put an end to the barbarities, bloodshed, starvation, and horrible miseries now existing there. We owe it to our citizens in Cuba to afford them protection and indemnity for life and property and to terminate the conditions that deprive them of legal protection. In addition, the right to intervene may be justified by the serious injury to the commerce, trade, and business of our people, and by the wanton destruction of property and devastation of the island. As this happens, the lives and liberty of our citizens are in constant danger. Our trading vessels are liable to seizure.

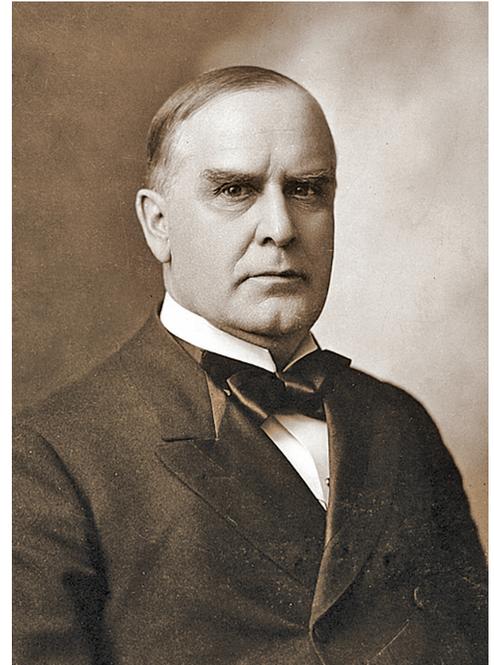
And, of course, all these reasons now seem stronger with the destruction of our battleship, the USS *Maine*, in Havana last February. The destruction of that noble vessel has filled the national heart with inexpressible horror. Whatever caused the explosion, the event is a clear and impressive proof of a state of things in Cuba that is intolerable.

In view of these facts, I have asked Congress to authorize and empower the president to take measures to secure a full and final termination of hostilities in Cuba, and to secure the establishment of a stable government and economy on that island. They have given me that power. *(Applause)*

Now it is time for our armed forces to recruit the best specimens of American manhood to go to Cuba. To those of you hoping to go to war in Cuba with Theodore Roosevelt, I say:

***Good luck during your interviews!***

*(Applause and cheering)*



# Interviewer's Sheet

You have been chosen as one of the interviewers with the goal of interviewing candidates for Theodore Roosevelt's cavalry unit, the Rough Riders. You will use the questions below to sort out the best candidates from all the volunteers. As you interview each candidate (or immediately after the interview and before the next candidate comes in), circle the numbers that indicate a trooper's quality on the **Rough Rider Evaluation Form**. Be a good, active listener (nod and smile often), ask short follow-up questions, and call each candidate "Trooper \_\_\_\_\_." Make the candidate comfortable during the interview.

## Acting tips

Don't get carried away. Limit the time for each interview to about four minutes.

Now walk outside your interview booth and call out randomly any one of the numbers you've been given. Greet the candidate with a smile and handshake and invite him to sit down across from you.

Practice these questions at home so that you will not have to read them from the sheet. Be spontaneous. Act genuinely interested in the candidates. They desire to serve their country.

## Questions to ask each candidate

(Each candidate will have filled out an application and should be somewhat prepared.)

1. "Trooper, how are you today? Tell me your name. (*pause*) Well, you want to be a Rough Rider and go to Cuba to fight Spaniards? Before we accept you, we need to ask you some important questions to see if you are good material and worthy of being a Rough Rider. Is that okay with you? (*pause*) Fine. Fighting in Cuba will not be a picnic, especially for the weak. Would you please describe your physical health?" (*Allow enough time for the candidate to answer properly.*)
2. "Colonel Roosevelt and General Leonard Wood know they'll encounter tough conditions in Cuba—food, sleeping, battle, etc. How well do you adapt to changes or new situations?"
3. "Can you endure hardships and deprivation, day after day without complaints?"
4. "Will you be able to deal with Cuba's extreme heat and humidity? What experiences in your life equip you to handle these extremes?"
5. "The Rough Riders will be riding horses, of course. How good are you in staying in the saddle and maintaining a horse or stable of horses?"
6. "What city and state are you from? And your occupation? Anything in your personal background that might help you as a Rough Rider?"
7. "Tell me how skilled you are with firearms and weapons."
8. "Sometimes a man's nickname reveals the real man. Many of the men I've interviewed have nicknames such as Rattlesnake Pete, Smokey, Cherokee Bill, Tough Ike, and Happy Jack Arizona. Do you have a nickname?"
9. "We estimate that one in three Rough Riders will probably die in combat or of disease in Cuba. Have you made arrangements with your family if this happens to you?"

10. "Although our 1st U.S. voluntary cavalry unit will be made up of rugged individualists, you will be under a strict military command—discipline, drill, and obeying orders. Do you think you can handle military life under these rules?"
11. "Are you proficient in any foreign language that might aid you and others in the capture, surrender, and treatment of the enemy?"
12. "Do you really love war, like Colonel Roosevelt does, and are you prepared to kill other human beings to achieve American victory?"
13. "Trooper, *why* do you want to go to Cuba and fight alongside Colonel Roosevelt?"
14. "Let's try a hypothetical question: Suppose you're walking along a trail in the Cuban jungle and three men jump out of the deep brush, point guns at you, and shout, 'Cuba Libre!' (*pause*) How would you react, and what would you say?"
15. "Well, Trooper, you've completed the interview with me. I understand you've drawn a symbol for the Rough Riders and perhaps even a motto to rally us in the heat and sting of battle. Show me what you have there."

Thank the trooper for his time, escort him out into the waiting area, and take a moment to complete the form. Then call out the next number you have. Walk the next candidate into the interview area and begin the interview.

# Rough Rider Evaluation Form

Prospective trooper's name:

\_\_\_\_\_

## Interviewer's Evaluation

*(Circle one number for each item.)*

- 1. Qualifications/Background 5 4 3 2 1
- 2. Attitude 5 4 3 2 1  
(Positive, eager, enthusiastic, adaptable, patriotic, etc.)
- 3. Soldiering Skills 5 4 3 2 1  
(Weapons, firearms, horse management, etc.)
- 4. Interviewing Skills 5 4 3 2 1  
(Assertive, clear, sociable, quick-witted, etc.)
- 5. Motto/Slogan for the Rough Rider Unit 5 4 3 2 1

Total: /25

Recommended for duty as a Rough Rider YES NO

Signed: \_\_\_\_\_

Prospective trooper's name:

\_\_\_\_\_

## Interviewer's Evaluation

*(Circle one number for each item.)*

- 1. Qualifications/Background 5 4 3 2 1
- 2. Attitude 5 4 3 2 1  
(Positive, eager, enthusiastic, adaptable, patriotic, etc.)
- 3. Soldiering Skills 5 4 3 2 1  
(Weapons, firearms, horse management, etc.)
- 4. Interviewing Skills 5 4 3 2 1  
(Assertive, clear, sociable, quick-witted, etc.)
- 5. Motto/Slogan for the Rough Rider Unit 5 4 3 2 1

Total: /25

Recommended for duty as a Rough Rider YES NO

Signed: \_\_\_\_\_

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# Roosevelt's Speech to His Rough Riders

Gentlemen, you have now reached the last point. If any one of you doesn't mean business, let him say so now. An hour from this moment, it will be too late to back out. Once in, you have to see it through. You have to perform without flinching—regardless of the duty assigned you, regardless of the difficulty or danger attending it. If it is garrison duty, you must attend it. If it is meeting the fever, you must be willing. If it is the closest kind of fighting, you must be anxious for it. You have been chosen because you know how to ride, how to shoot, how to live in the open. Absolute obedience to every command is your first lesson. No matter what comes, you must not squeal. Think it over, all of you who have passed the physicals and interviews today. If any man wishes to withdraw, he will gladly be excused, for others wish to take his place (*pause and look for dropouts*). It appears that all of you wish to be a Rough Rider. All right, men, raise your right hand and repeat after me:

**THE OATH:** I, (*name*) . . . am now a Rough Rider . . . a fully enlisted man of a U.S. army cavalry unit. . . . I promise to be brave . . . to obey all orders . . . and to perform all the duties, however dangerous, . . . I am asked to do as a Rough Rider. . . . This I so swear.

Congratulations, men. Now, let's go train to be the best fighting unit for Uncle Sam. Then, Rough Riders, it's off to Cuba.

**THE ROUGH RIDER YELL: HIP, HIP, HOORAY! HIP, HIP, HOORAY! HIP, HIP, HOORAY!**



Colonel Theodore Roosevelt in Rough Rider uniform. Notice his boots with steel spurs and his slouch hat.

*Image Source:* Colonel Theodore Roosevelt. By George Gardner Rockwood, 1898, courtesy of the Library of Congress, LC-USZ62-39935.

# Postscript

The men who became Rough Riders—cowboys, miners, Indians, gamblers, and Ivy League athletes—fought valiantly in Cuba, and, as a result, they earned an enduring place in U.S. history. Aided by Roosevelt's unique fighting unit, the United States went on to easily win the Spanish-American War (mostly because the Spanish were more unprepared and inept than the Americans).

Names suggested other than Rough Riders:

- Teddy's Texas Tarantulas
- Teddy's Terrors
- Wood's Wild Westerners
- Roosevelt's Rangers

The U.S. Army was not in any state of preparedness to aid units such as the Rough Riders. The army issued Civil War–vintage rifles and heavy woolen winter uniforms—for use in Cuba in the summer! The tinned beef available to the troops turned out to be tainted, and the unsanitary conditions in the crowded camps produced a high number of typhoid and dysentery cases. Additionally, it would take two months before any U.S. soldiers sailed for Cuba. Once they were there, food and supplies never seemed to arrive at the same place as the men. Shockingly, more troopers died of tropical diseases than Spanish bullets, again, because the government had not planned adequately. The U.S. Navy, however, proved to be ready. Quick victories in the Philippines (George Dewey at Manila Bay) and in Cuba showed the U.S. Navy to be a superior power.

So, the United States won the 119-day war with the help of a blundering Spain. Secretary of State John Hay summed up the conflict better than any contemporary. He wrote to Theodore Roosevelt in late summer 1898: "It has been a splendid little war; begun with the highest motives, carried on with magnificent intelligence and spirit, favored by that fortune which loves the brave."

Splendid and short the war was, and the recipient of that letter, Colonel Roosevelt, did indeed show intelligence, spirit, and bravery. His Rough Riders left Tampa for a nine-day voyage to Cuba, but with no landing craft, they and their few horses had to swim ashore. They then camped at Daiquiri before trudging on foot through a terrible storm to Siboney. While slogging through a dense jungle on the way to Las Guasimas, the hardy group was ambushed, and sixteen men were killed. On July 1, 1898, they received orders that would immortalize the unit and its colonel. They were to take the Spanish forts above Santiago. Heroically, the Rough Riders, led by Roosevelt, charged up Kettle Hill, fought the entrenched Spaniards, and then captured the city below. Roosevelt later described the experience as "my crowded hour."

General Leonard Wood actually commanded the military unit, but Roosevelt's high profile overshadowed Wood.

The Rough Riders' success was aided by the brave support of African American troopers of the Tenth Cavalry, a unit mostly unsung during this short war.

With the war soon over, Roosevelt returned to New York. He and his men—the Rough Riders—were heroes. He also found immense support for him to run for governor. During his campaign, a bugler's music preceded his campaign speeches. Surrounded by uniformed Rough Riders, Roosevelt used his military mystique skillfully to help him win the election. Two years later, in 1900, he was selected to be President McKinley's running mate. Serving as vice president for only six months, Roosevelt became president in September 1901, when McKinley died from wounds inflicted by an assassin's bullet.

Who better than a colonel in the Rough Riders, a hero of the recent war with Spain, to lead the United States into the twentieth century? Aggressive and determined to make the United States a presence in world affairs, Roosevelt would take over just as the nation decided to flex its muscles in the Caribbean and the Philippines. A two-year war there against the same Filipinos who had fought with Americans against Spain began forty-five years of U.S. control on the immense island chain.

Likewise, the U.S. presence in the Caribbean would be a strong one throughout the twentieth century. Cuba, especially, would continue to play a pivotal role in U.S. relations in this region. In 1962, during the Cold War, a Russian attempt to place long-range nuclear missiles in communist Cuba forced President John F. Kennedy to blockade, or quarantine, the island. This action put the pressure on Soviet premiere Nikita Khrushchev, who, after thirteen harrowing days, abandoned plans to activate deadly weapons on sites in Cuba only ninety miles from Florida.

Stakes were higher in 1962 than in 1898, but the Spanish-American War, with the fearless Rough Riders charging up Kettle Hill, was a turning point in American history. Winning the war thrust our nation onto a world stage to play a major role in the twentieth century.



# Historical Investigation Activity

## *Rough Rider Interviews (1898)*

By Bill Lacey

### Focus Question

To what have U.S. history textbooks over the last century attributed the cause of the sinking of the U.S. battleship *Maine*?

### Materials Needed for This Historical Investigation

- **Documents A–G**—class set
- **Points to Ponder Response Sheet**—class set
- **A History of USS *Maine* Investigations**—class set

### Lesson Plan

#### 1. Getting Started

- Whether you did the Activator on the Rough Riders or not, review or find out what your students know about the Spanish-American War and specifically about the sinking of the battleship USS *Maine*. Utilize a graphic organizer and, as students respond, put their comments on the board as spokes of a wheel with the hub labeled “Spanish-American War.” “Sinking of the *Maine*” would be one spoke.

#### 2. Backstory to Use as Instruction

- The Rough Rider interviews, if indeed they were a formal sit-down affair as the Activator suggests, led to the recruitment of a cadre of eager cavalry warriors under the leadership of General Leonard Wood and Colonel Theodore Roosevelt. The war they faced was in Cuba and the cause of this conflict was rooted in jingoism and war fever, yellow journalism, sympathy for the freedom-seeking Cubans, American economic interests, and a muscle-flexing sense of America’s destiny for empire beyond its borders. The immediate cause, however, was the sinking of the USS *Maine* in Havana harbor on February 15, 1898.
- The sinking of the USS *Maine*, like the attack on Pearl Harbor over forty years later, galvanized American opinion, thanks to sensational, exaggerated, and lurid headlines in the New York dailies, usually void of any solid evidence and based on false reporting.
- Yellow journalism aside, what caused the *Maine* to explode? Was this explosion the result of an external or internal force? If the former, was it a result of a mine or torpedo? U.S. history textbooks, from that era to our own, have shifted blame for the cause of the sinking of the



American battleship. Perhaps this is not surprising. After all, a hundred years to examine the evidence closely would no doubt lead to changing interpretations of any event, especially one that led to a war and served as a catalyst for the emergence of the United States as a New World power. During the brief war with Spain, the *Maine's* wrecked hull became an important symbol ("Remember the *Maine!*") for the four months of war fever and battles.

- School textbooks have become, in the over one hundred years since 1898, important tools in assessing this conflict. Analyzing how textbooks—from six distinct eras—have interpreted the sinking of the *Maine* reveals as much about the times in which the texts were written as it does about scholarship, through changing interpretations by the writers and their biases. Each era gives a fresh and current interpretation of the sinking of the *Maine*. Furthermore, the six versions—and our examination of each—illustrates a key component of studying history: The writing of history is dynamic, not static. Stories are told differently by succeeding generations of historians, based on new evidence and different points of view.
3. Say, "So, what caused the explosion that sunk the *Maine* and led to war, and how have textbooks over the century covered this topic? Before we look at the documents relevant to this issue, let me hand out the **Points to Ponder Response Sheet** so you can write a few headlines about the fate of the *Maine* that night."
  4. Read over question #1 on the **Points to Ponder Response Sheet** for students and clarify their task. Encourage creativity and allow five to seven minutes for students to work before having a discussion using student responses. A clever 1974 headline example: "Should Blame for *Maine* Fall Mainly on Spain?"
  5. Pass out the package of **Documents A–F**. Say, "What do the documents tell us and what can we conclude? That's our task." It may be wise to read the first one or two documents aloud and go over what they say. Remind students to work through the documents carefully, and tell them there is no order or sequence to the documents. Once you are done, release students (in pairs or small groups) to work.
  6. Allow thirty to forty minutes for students to work and fill out questions #2–7 on the **Points to Ponder Response Sheet**.
  7. Hand out **Document G**, which discusses the expert opinion of Professor Philip Alger from an interview one day after the incident in Cuba. Have students read the excerpt and answer questions #8–9 before having a discussion on how this particular document may alter their claims.

## Rough Rider Interviews: 1898

### Historical Investigation Activity



8. Hand out **A History of USS Maine Investigations**. Have students read the sheet, then answer question #10. An additional activity: Have students apply the dates of the inquiries/investigations to the textbook publication dates to see if the findings of the inquiries might have seeped into the textbooks of those years. This is an example of how history is dynamic rather than static.
  
9. Then discuss thoroughly and have students write their answers to the **Focus Question**. Have volunteers read these to conclude the activity.

Name \_\_\_\_\_ Date: \_\_\_\_\_

# Points to Ponder Response Sheet

**Focus Question:** To what have U.S. history textbooks over the last century attributed the cause of the sinking of the U.S. battleship *Maine*?

## 1. Warm-up activity

Write a sensationalized headline as if you were an editor for a competitive New York newspaper in 1898, suspecting or blaming the Spanish for blowing up the *Maine*.

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Write a headline for a 1974 newspaper, concluding that the explosion and sinking of the *Maine* was likely an ill-timed accident, caused by a fire in the rooms where the ship stored its coal and ammunition.

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## 2. Document A

	Cause of Explosion	Evidence/Details
Year of Publication _____		
How Many Years after 1898? _____		

## 3. Document B

	Cause of Explosion	Evidence/Details
Year of Publication _____		
How Many Years after 1898? _____		

My opinion after reading **Documents A** and **B**:

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**4. Document C**

	Cause of Explosion	Evidence/Details
Year of Publication _____  How Many Years after 1898? _____		

**5. Document D**

	Cause of Explosion	Evidence/Details
Year of Publication _____  How Many Years after 1898? _____		

**6. Document E**

	Cause of Explosion	Evidence/Details
Year of Publication _____  How Many Years after 1898? _____		

**7. Document F**

	Cause of Explosion	Evidence/Details
Year of Publication _____  How Many Years after 1898? _____		

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8. Document G

Claim	Year Claim Made	Claim Made By	Evidence/Details

9. My claim, after analyzing all documents, on what caused the sinking of the *Maine*:

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The source that convinced me the most was \_\_\_\_\_ because:

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10. New data from **A History of USS Maine Investigations** that might alter my claim:

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11. Based on the documents you analyzed, write a long paragraph answering the **Focus Question** at the top of this sheet. Make at least three major points to support your claim.

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# A History of USS *Maine* Investigations

Not counting the Philip Alger interview with the *Washington Star* one day after the *Maine* was sunk (**Document G**), there have been several formal inquiries/investigations into how and why the *Maine* was destroyed. Most of these investigations, from 1898 to the present, agree that an explosion in the forward magazine (where ammunition and firearms are stored) caused the destruction and sinking of the ship, but different conclusions have come out of these inquiries over the years.

**The Spanish Inquiry** (February 1898): Headed by two men, Del Peral and De Salas, this inquiry collected evidence from naval officers after they had examined the remains of the ship. They identified the likely cause of the explosion as the spontaneous combustion of the coal bunkers, certainly not Spanish treachery. They also concluded that there were no dead fish in the harbor and that no columns of water were observed, both consistent with an external mine explosion on the ship's hull.

**The Sampson Board's Inquiry** (February–March 1898): This inquiry rejected a Spanish request for a joint two-nation investigation indicating that Spain was anxious to prove that the catastrophe was not caused by the Spanish. This board took extensive testimony from survivors, witnesses, and divers. They concluded that a submarine mine had blown up the *Maine*, which then caused an explosion in the ship's magazine, because most witnesses heard two explosions. The board found that no one person or persons were responsible.

**Vreeland Court of Inquiry** (1911): As this board convened, Cuba asked for the unsightly wreck to be removed and then indicated a desire for a more thorough investigation. The board did use more qualified personnel (engineers), and the conclusions and methods they used exhibited more objectivity. This inquiry concluded that an external explosion (a mine or torpedo) triggered an explosion in the magazines.

**The Rickover Investigation** (1974): This investigation used data from the two preceding U.S. investigations (newspapers and personal papers) and called on naval demolition and ships' explosion experts to testify. The investigation concluded that the explosion was not caused by a mine but most likely, the inquiry speculated, by a spontaneous combustion of coal reserves in a bunker-compartment next to the magazine. The full results were published in Admiral Rickover's book, *How the Battleship Maine Was Destroyed* (1976).

**National Geographic Investigation** (1998): This investigation was conducted to commemorate the centennial of the sinking and was the first inquiry to use computer technology, which was unavailable for the earlier investigations. The findings were inconclusive. However, the data collected shows that a small handmade mine could have set off the explosions within the ship and, further, that the soil depression beneath the ship was more likely caused by a mine than a magazine explosion. The data, it was concluded, did not prove an external cause, only slightly strengthened the case for a mine.

**History Channel Inquiry** (2002): In an episode from its popular *Unsolved History* series, the History Channel investigated the *Maine's* sinking. The program utilized pictures, naval experts, and archival data to conclude that the coal bunker fire caused the explosion and that a gap between the coal and powder compartments allowed the fire to spread.

### Other Theories

A few Cuban historians and officials believe that the United States deliberately blew up the battleship in Havana harbor to create a pretext to go to war with Spain and take Cuba and the Philippines as war prizes. This theory is seen as a standard Cuban perspective on the sinking of the *Maine*. Some Russian officials have made the same claim.

Whatever the cause of the sinking, the *Maine* was refloated and then scuttled at sea in March 1912. The ship's main mast and the remains of many of the sailors who died that fateful night of February 15, 1898, are in a special section of Arlington National Cemetery in Virginia, across the Potomac River from Washington, D.C.

Source: Wikipedia



The *Maine* entering Havana harbor, January 1898.

Image Source: U.S. Dept. of Defense, via Wikimedia Commons.

# Document A

## 1905 Textbook

The war with Spain had been over for six years when this account was published in a textbook.

*Demonstrations against the Americans in Havana led our government to send the battleship *Maine* to that city. On the night of February 15, 1898, the *Maine* was blown up by an explosion, which killed 260 of the men; and an American naval board of inquiry later reported that the ship was destroyed by a submarine mine. Our consul-general, Fitzhugh Lee, said: "I do not think it was put there by the Spanish government. I think probably it was an act of four or five subordinate officers." Yet there was a widespread feeling in the United States that the Spanish government was responsible.*

Source: Albert Bushnell Hart, *Essentials in American History* (New York: American Book Company, 1905).

# Document B

## 1920 Textbook

Twenty-two years had passed since 1898 and textbooks like this one added more detail. Blame appears to be spread out.

Prudence and humanity alike forbade the continuance of these horrible conditions at our very doors. The platforms of both the great parties in 1896 expressed sympathy for the Cuban insurgents, and both Houses of Congress passed resolutions for the recognition of Cuban independence. President McKinley labored hard to get Spain to grant the island some degree of self-government and spoke in a hopeful tone in his message to Congress of December, 1897. But in the early weeks of 1898 events occurred which roused public indignation to a pitch where it drowned the voices of diplomacy. On February 9 a New York paper published the facsimile of a private letter written by the Spanish minister at Washington, Señor de Lome. The letter characterized President McKinley as a "cheap politician who truckled to the masses." The country was still nursing its indignation over this insult to its chief executive when it was horrified by the news that on the evening of February 15 the battleship *Maine*, on a friendly visit in the harbor of Havana, had been sunk by a terrific explosion, carrying two officers and 266 men to the bottom. The Spanish government immediately accepted the resignation of Señor de Lome and expressed its sorrow over the "accident" to the American warship. But the conviction that the *Maine* had been blown up from the outside seized on our people with uncontrollable force. Flags, pins, and buttons, with the motto "Remember the *Maine*!" appeared all over the land. The spirit of revenge was nurtured by the "yellow journals." Congress was waiting eagerly to declare war.

Source: David Saville Muzzey, *An American History* (Boston: Ginn, 1920).

# Document C

## 1933 Textbook

Evidence, not sensationalism, is now included in this version, which was published thirty-five years after the sinking of the *Maine*.

At this juncture the United States sent the battleship *Maine* to Havana to protect American interests. This formidable sea-fighter arrived in January, 1898, and steamed past the battlements of Morro Castle to her anchorage in the harbor. On the evening of February 15, when most of the crew of the *Maine* had turned in, there came a blinding flash, accompanied by a roar. Fragments were seen flying through the air. From the crew's quarters came groans, and cries for help. There followed a lurching motion, then a heavy list, and the ship began to sink. Captain Sigsbee directed the lowering of the boats, and gave the order: "Abandon ship." Two officers and 266 men found their graves in the mass of twisted steel. A cry of horror arose in the United States. "Can it be that the Spaniards anchored the *Maine* over a mine with the purpose of destroying her?" they asked. "Is this their method of diminishing our naval power?" When a board of experts reported that the condition of the armor-plates showed that the *Maine* had been blown up from the outside, war was inevitable. "Remember the *Maine*" became the slogan of the nation. It has never been proved that the destruction of the *Maine* was due in any way to the Spanish government.

Source: Thomas J. Wertenbaker and Donald E. Smith, *The United States of America: A History* (New York: Charles Scribner's Sons, 1933), as reprinted in Kyle Ward, *History in the Making: An Absorbing Look at How American History Has Changed in the Telling over the Last 200 Years* (New York: The New Press, 2006).

# Document D

## 1961 Textbook

The Cold War rivalry between the United States and the U.S.S.R. was raging and Cuba was now a player in international affairs when this textbook was in use.

At midnight on February 15, 1898, while the battleship *Maine* was at anchor in Havana harbor, an explosion sent her to the bottom. More than 250 officers and sailors died. Next morning, American newspapers told in banner headlines how the battleship had been “blown up” and American sailors “murdered” in time of peace. From the commander of the *Maine* came a quiet word asking Americans to “withhold judgment”—that is, to accuse no one until the cause was known.

To this day, no one knows how the ship was destroyed. Spanish officials claimed the *Maine's* sides were blown out by an explosion of her powder magazine. Other investigators stated her sides were blown in by a torpedo or a bomb. There was a possibility that Cuban rebels might have set off the explosion, hoping the United States would blame Spain and so give the Cubans support in their fight for freedom. Many people jumped to the conclusion that Spanish officials had planted a mine beneath the *Maine*. This was almost certainly not true. Spanish leaders were trying desperately to avoid war with the United States. They had nothing to gain by destroying the *Maine*. Unfortunately, people did not stop to think and reason. In the streets, in the newspapers, even in the halls of Congress, there rose a clamor for war. “Remember the *Maine!*” was the cry that echoed throughout the country.

Source: Glenn W. Moon and Don C. Cline, *Story of Our Land and People* (New York: Holt, Rinehart and Winston, 1961) as reprinted in Kyle Ward, *History in the Making: An Absorbing Look at How American History Has Changed in the Telling over the Last 200 Years* (New York: The New Press, 2006).

# Document E

## 1986 Textbook

As the years recede, doubt creeps into textbooks and also any certainty about blame seems absent in textbooks like this one.

Both President Cleveland and President McKinley had tried to persuade Spain to give the Cuban people more say about their government. They failed to make much impression. Tension increased. Then, in January 1898, President McKinley sent a battleship, the U.S.S. *Maine*, to Cuba. There had been riots in Havana, the capital city. McKinley sent the *Maine* to protect American citizens there against possible attack.

On February 15, while the *Maine* lay at anchor in Havana Harbor, a tremendous explosion rocked the ship. Of the 350 men aboard, 266 were killed. The *Maine* sank to the bottom.

To this day no one knows for sure what happened. Many Americans jumped to the conclusion that the Spanish had sunk the ship with a mine, a kind of underwater bomb. The navy conducted an investigation. It concluded that the *Maine* had been destroyed by a mine. Another American investigation in 1911 also judged that an explosion from outside had destroyed the ship.

The Spanish government claimed the disaster was caused by an explosion inside the *Maine*. This is certainly possible. A short circuit in the ship's wiring might have caused the *Maine's* ammunition to explode, for example. It is difficult to imagine that the Spanish would have blown up the ship. The last thing Spain wanted was a war with the United States.

Emotions were inflamed on all sides. The Spanish government, or some individual officer, may indeed have been responsible. Or it is possible that the Cuban rebels did the job, knowing that Spain would be blamed.

In any case, a demand for war against Spain swept the United States. In New York City a man in a Broadway bar raised his glass and proclaimed, "Remember the *Maine*!" This became a battle cry similar to "Remember the Alamo!" during the Texas Revolution of the 1830s.

Source: John A. Garraty, *American History* (Orlando, FL: Harcourt Brace Jovanovich, 1986), as reprinted in Kyle Ward, *History in the Making; An Absorbing Look at How American History Has Changed in the Telling over the Last 200 Years* (New York: The New Press, 2006).

# Document F

## 2003 Textbook

More recent textbooks, like *The Americans*, often refer to new evidence to bolster an argument or cast doubt on previous assertions. The section “The Mystery of the *Maine*” was printed in the wrap-around margin of the teacher’s edition as an encouragement to update students.

**THE DE LÔME LETTER** American sympathy for “Cuba Libre!” grew with each day’s headlines. When President William McKinley took office in 1897, demands for American intervention in Cuba were on the rise. Preferring to avoid war with Spain, McKinley tried diplomatic means to resolve the crisis. At first, his efforts appeared to succeed. Spain recalled General Weyler, modified the policy regarding concentration camps, and offered Cuba limited self-government.

In February 1898, however, the *New York Journal* published a private letter written by Enrique Dupuy de Lôme, the Spanish minister to the United States. A Cuban rebel had stolen the letter from a Havana post office and leaked it to the newspaper, which was thirsty for scandal. The de Lôme letter criticized President McKinley, calling him “weak” and “a bidder for the admiration of the crowd.” The embarrassed Spanish government apologized, and the minister resigned. Still, Americans were angry over the insult to their president.

**THE U.S.S. MAINE EXPLODES** Only a few days after the publication of the de Lôme letter, American resentment toward Spain turned to outrage. Early in 1898, President McKinley had ordered the U.S.S. *Maine* to Cuba to bring home American citizens in danger from the fighting and to protect American property. On February 15, 1898, the ship blew up in the harbor of Havana. More than 260 men were killed.

To this day, no one really knows why the ship exploded; In 1898, however, American newspapers claimed the Spanish had blown up the ship. The *Journal’s* headline read “The warship *Maine* was split in two by an enemy’s secret infernal machine.” Hearst’s paper offered a reward of \$50,000 for the capture of the Spaniards who supposedly had committed the outrage.

### ***The Mystery of the Maine***

Two different theories have emerged about what caused the mysterious explosion onboard the *Maine*. In 1911, the U.S. Army Corps of Engineers examined the *Maine* on the ocean floor. Based on the discovery of a piece of the ship's hull that was dented from the outside and bent inward, it was determined that a small mine had rocked the vessel.

In 1976, navy researchers examined the piece of bent hull and the photographs taken during the 1911 probe. They concluded that a massive internal explosion had caused the ship's damage. The most likely cause of the explosion was a spontaneous fire in a coal bunker that ignited a nearby supply of weapons.

Source: Gerald A. Danzer et al., *The Americans: Reconstruction to the 21st Century* (Evanston, IL: McDougal Littell, 2003).

# Document G

## Early Reactions

Philip Alger, a professor at the U.S. Naval Academy and an expert on explosives, gave his opinion on the explosion that sank the *Maine* the day after the incident. No formal investigation had taken place yet. Interestingly, within days after, Secretary of the Navy John Long said it was “the result of an accident” and Captain Charles Sigsbee thought the explosion came from an internal fire near the magazine (a place or compartment where firearms and ammunition are stored).

No torpedo such as is known in modern warfare can of itself cause an explosion as powerful as that which destroyed the *Maine*. We know of no instances where the explosion of a torpedo or mine under a ship's bottom has exploded the magazine within. . . .

Magazine explosions . . . produce effects exactly similar to those effects of the explosion on board the *Maine*. When it comes to seeking the cause of the explosion of the *Maine*'s magazine, we should naturally look not for the improbable or unusual causes, but those against which we have had to guard in the past. The most common of these is through fires in the bunkers. Many of the ships have been in danger various times from this cause and not long ago a fire in the *Cincinnati*'s bunkers actually set fire to fittings, wooden boxes, etc., within the magazine and had it not been discovered at the time it was, it would doubtless have resulted in a catastrophe on board that ship similar to the one on the *Maine*.

Source: Philip Alger, quoted in the *Washington Star*, as reprinted in Evan Thomas, *The War Lovers: Roosevelt, Lodge, Hearst, and the Rush to Empire*, 1898 (New York: Little, Brown, 2010).



# Icons of Industry 1906

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Bill Lacey



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## Lesson Plan

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### Overview

Iconic industrialists and entrepreneurs like Rockefeller, Carnegie, Vanderbilt, Morgan, Edison, and Sears defined the post–Civil War years, an era that saw the United States transformed, with their help, from an agrarian economy into an industrial powerhouse. Who among these business titans might stand alone, above the rest as the Most Valuable Entrepreneur (MVE), if they went head to head in a competition to win over an audience of booster club supporters? Presenting their cases convincingly not only tests these businessmen’s ability to relate their “rags to riches” stories but also showcases each man’s charisma and persuasive talents. It is 1906 and your students will portray these superstar icons of American business in a fictional panel show. Other students serve as hosts and zealous booster clubbers in a lively competition to learn essentials of key biographies and data from the unique Gilded Age of U.S. history.

### Setup

#### 1. Duplication

- **Background Essay**—*class set*
- **Postscript**—*class set*
- **Sign-up Roster**—*one master copy*
- **Entrepreneur—Are You One?** (optional)—*class set*
- **Overview**—*one master copy* to read aloud
- **Emcee Script**—*one copy* for each student emcee (Mark Twain and Alice Roosevelt)
- **Savvy Six Profile Sheets**—*3 copies of each, one copy* for the student playing the role and two copies distributed among his booster club colleagues
- **Booster Clubbers**—*class set*
- **MVE Ballot**—*class set* to be cut into half-slips for voting
- **Summary Statements**—*15 copies* (one for each summary stater) or cut *one copy* into fifteen slips and distribute individually to each summary stater

2. **Schematic, props, costumes:** Your students may not need to see the **Schematic** page to move desks around. Read it carefully and note that

the panel of entrepreneurs is seated in front for most of the activity, with the remainder of the class facing them as an audience. Booster club groups prepare each candidate in a cooperative group configuration. The last activity calls for fifteen students to stand up in front of class and state their individual summaries. There is no need for fancy props (perhaps risers or a small stage). You may want to use a podium and microphone for the emcees and name placards for the MVE candidates. Costumes are encouraged for the panelists. Suggestions for them are offered on their individual profile sheets. A nice flourish, too, would be for Mark Twain and Alice Roosevelt to “dress up.”

### 3. Roles

- a. Use the **Sign-up Roster** to fill roles. In all, you will need six MVE candidates, two emcees, and fifteen summary staters. Select your most reliable and dramatic students to play these parts. The rest of your class will form the booster clubs and then become a vocal audience during the interview portion of the Activator.
- b. Encourage the emcees to research Mark Twain and Alice Roosevelt and to wear a clever costume piece to project a reasonably accurate portrayal.

### 4. Suggestions and flourishes

- Allow a full period or more to complete the activity. Two periods would be needed if you add the **Background Essay** and allow three periods if you decide to have booster clubs prepare the panelists.
- Require note taking for all students in the audience, and possibly the panelists.
- Stage the activity with the panelists up in front sitting behind small placecards:

John D. Rockefeller  
Industrial Philanthropist

Also consider a large banner behind the panel. Examples: “Who will be the MVE?” or “MVE of the Industrial Age” or “The Savvy Six.” Use microphones if you have access to them.

- Introduce each panelist dramatically with some fanfare. Play some appropriate music as background to your introduction.
- Develop a glossary page to help students with terminology particular to this era (entrepreneur, corporation, robber barons, etc.).

- Encourage students to show appreciation before and after each panelist presents by applauding.
- At the very end—after all is done and before you thank everyone—have all students vote for MVE. Go over criteria before ballots are passed out. Have a second vote to decide among the top three vote getters.

## Directions

1. At least two or three days before, fill in the **Sign-up Roster**.
2. Rearrange the desks to resemble the **Schematic**.
3. Find and set up a podium and microphone for the emcees. If you are playing some background music for the dramatic entrances of the six entrepreneurs, make sure you have an adequate sound system. Recommended: "16 Tons" sung by Tennessee Ernie Ford, "I've Been Workin' on the Railroad," or perhaps some ragtime music from the 1974 film, *The Sting*. "Sweet Adeline," "You're a Grand Old Flag," "Give My Regards to Broadway," "In My Merry Oldsmobile," or some soft classical music would also be an appropriate choice. Be creative here.
4. On the day of the actual panel activity . . .
  - a. Make sure all participants are in class and are ready to perform, the room resembles the **Schematic** page, you have a podium, and the appropriate music is cued up.
  - b. When all is in order, go over the **Overview** page. Have the six entrepreneurs read their introductions.
  - c. Send the six entrepreneurs into an adjoining room or hallway to await your dramatic introductions.
  - d. When all is ready, point to the emcees to begin the **Emcee Script**.

You have a few different ways you can conduct this Activator:

### Option A

1. This option is implementation of the full Activator (probably over two days), which includes the **Background Essay**; **Booster Club** preparation; **Emcee Script** (where emcees interview all six entrepreneurs); **Summary Statements**; and voting (once or twice) for MVE.

### Option B

1. Dispense with the **Booster Club** session with the candidates and go forward to the panel activity.

2. To facilitate and speed up the interviews, you the teacher could serve as emcee. As you do, improvise by amplifying and clarifying data, add some humor, interject wisdom, and help the candidates when they stumble.

### Option C

1. Use the data in the **Background Essay** as a lecture or quick summary.
2. Have each of the six entrepreneurs sit on a panel and read only the **MVE Arguments** in their profile handouts.
3. Take a hand vote to see which one is the MVE.

### Debriefing

Decide whether you wish to use a short or long debriefing. Here are possible ways to make meaningful what happened during this Activator involving the iconic entrepreneurs in the Age of Industry:

#### Short Debriefing

1. Pass out the **Postscript**. Either read this aloud to your students or use the data as a basis for a lecture to cover the main points.
2. Discuss with students what they learned from the activity, which entrepreneur they admire the most, which one impacted American history the most, and which of the six they might want to ask to dinner (what would they serve?).
3. Consider having students write a Learning Log entry following the short debriefing.

#### Long Debriefing

Use one or more of the following debriefing activities:

1. Pass out the **Postscript** pages and read aloud. Either read this to your students or summarize the main points.
2. As an extension to the voting process, have several students state whom they voted for and why.
3. As a follow-up, hand out the fifteen **Summary Statements** to students who were not in the activity up to now. Have them form a circle around the class, or stand in a line. In sequence, have the **Summary Statements** read aloud dramatically. You may choose to clarify for understanding.

4. Show a video snippet from the **Visual history** section and discuss it.
5. Pass out or display **Entrepreneur—Are You One?** Have students then check off the nine statements to gauge their entrepreneur aptitude. Discuss results.
6. Discuss with students the historical reasons that these entrepreneurs have been labeled “robber barons.” Ask students why this label has been stuck on Vanderbilt, Morgan, Carnegie, and Rockefeller, especially, if not Edison and Sears. Perhaps you could have students fill in a “T” chart to visually assess the assertion.

**Robber Barons**

Evidence For	Evidence Against

7. Ask students which of these entrepreneurs they would personally consider working for and why.
8. One writer summed up the motives of a couple of these businessmen with the phrase “Greed posing as philanthropy.” **Ask students:** Do you think greed drove these men? What other motives would they give if an interviewer in 1906 asked why they were obsessive, cutthroat, and driven to be successful and at the top?
9. **Ask students:** Should giving millions of dollars away to educational institutions, libraries, and charities give these entrepreneurs a free pass, excusing them from any immoral methods used in making their millions?
10. Have students write the name of the entrepreneur they voted for on a half-sheet of paper. Underneath, have them write one or two questions they would like to ask him and the answer they think he would give. (Or have students exchange questions and write the responses.)
11. Have students compose a haiku using the name and career of the icon they voted for. Put this formula on the board:

Line 1: 5 syllables

Line 2: 7 syllables

Line 3: 5 syllables

(The last line should be ironic—a twist/opposite from the expected.)

12. Most entrepreneurs in this era used a few unethical strategies to minimize and on occasion to destroy competition from others in their areas or business fields. Have students make a list of what they would do today, in their hypothetical businesses, to do the same—minimize competition, but using legal and ethical strategies.
13. Consider having students write a Learning Log entry, detailing their thoughts and feelings about participating in this Activator.

## Resources to consult

- Beatty, Jack. *Age of Betrayal: The Triumph of Money in America, 1865–1900*. New York: Alfred A. Knopf, 2007.
- Brands, H. W. *American Colossus: The Triumph of Capitalism, 1865–1900*. New York: Anchor, 2010.
- Chernow, Ron. *The House of Morgan: An American Banking Dynasty and the Rise of Modern Finance*. New York: Grove, 1990.
- . *Titan: The Life of John D. Rockefeller, Sr.* New York: Random House, 1998.
- Folsom, Burton W. *The Myth of the Robber Barons: A New Look at the Rise of Big Business in America*. Herndon, VA: Young America's Foundation, 2010.
- Geisst, Charles R. *Monopolies in America: Empire Builders and Their Enemies from Jay Gould to Bill Gates*. New York: Oxford University Press, 2000.
- Josephson, Matthew. *The Robber Barons: The Great American Capitalists, 1861–1901*. New York: Harvest, 1962.
- Latham, Earl. *John D. Rockefeller: Robber Baron or Industrial Statesman?* Lexington, MA: D. C. Heath, 1949.
- Morris, Charles R. *The Tycoons: How Andrew Carnegie, John D. Rockefeller, Jay Gould, and J. P. Morgan Invented the American Supereconomy*. New York: Henry Holt, 2005.

## Visual history

**Documentaries:** There have been countless programs on History Channel and PBS that have touched upon, or exclusively covered topics about, the captains of industry of the Gilded Age. *American Experience* has several episodes on the topic: “The Richest Man in the World” (Andrew Carnegie), “The Rockefellers,” and “Mr. Sears’ Catalogue.” *The Men Who Built America* is a miniseries from 2012 that covers Ford, Carnegie, Rockefeller, Morgan, and Vanderbilt.

# Background Essay

**Place:** Madison Square Garden, New York City

**Time:** March 1906

## ***A rare opportunity!***

Vanderbilt, Rockefeller, Carnegie, Morgan, Edison, and Sears—these “go-getters” defined their era, the Industrial Age (1865–1910), helping to transform America into an economic powerhouse. Though fictitious, this Activator’s head-to-head competition between the most renowned business leaders of the day offers you a rare opportunity. Here they are, together on one big stage at New York City’s famous Madison Square Garden in 1906—and you’re part of it! Will you portray one of these six savvy entrepreneurs? Or will you be one of the emcees? Or a zealous booster club fan for one of the six?

## ***Unrivaled leadership***

Whatever historians call this historical period—the Industrial Age, Rise of Industry, Era of Industrialization, or Emergence of Big Business—the years from 1865 to 1910 forever changed America. In those forty-five years, steam and electricity replaced human muscle and steel replaced wood and iron. Steel products were made by oil-lubricated machines, and the goods—and people—were moved by railroads along steel rails. At the same time, the work of business was sped up by the typewriter and the telephone. All these elements propelled the United States to its unrivaled position as the leading industrial power in the world. Currently a postindustrial society, the United States remains the world’s strongest and wealthiest economy.

## ***America the Bountiful***

Indicators that the United States was headed—and even destined—for unparalleled economic growth were seen before 1850. Entrepreneurs like Eli Whitney and others developed their businesses and profited by implementing the factory system. These men gathered together

necessary resources, machines, and workers at one site to mass-produce their products. They were also aided by an abundance of natural resources that would play a key role in the emergence of big business after the Civil War: swift-running rivers and streams for water power, vast forests to supply timber and coal, iron ore and petroleum mined and drilled over the next century to ensure sustained growth.

## ***The Civil War: industrial launchpad***

One prolonged event more than any other served as a catalyst for American economic growth: the Civil War. This pivotal conflict (1861–1865) not only preserved the Union, but was also a dividing point for the economic history of the nation. Before the war, the United States was an agricultural society. The nation’s natural resources such as coal, iron ore, and petroleum were little used. The Civil War promoted industrial growth, especially in the north, where factories produced rifles, artillery, uniforms, and other vital war material.

## ***Industrial Revolution***

After the war, and arguably because of it, America was transformed by an “industrial revolution.” This dramatic change was characterized by the rapid growth of larger cities, mechanization, the mass production of items for an expanding population, technological invention, and an ever-expanding transportation network to link factories to markets.

## ***Railroads***

The first great transportation network to serve America’s industrial growth was the railroads. Perhaps more than anything else, the railroads helped transform the American landscape of mostly rural, isolated communities into a

somewhat unified, interdependent economy. At the same time, railroads moved passengers and freight to link towns and cities. One rail line between New York and Chicago was the result of efforts by former steamboat entrepreneur “Commodore” Cornelius Vanderbilt. In 1869, the completion of the transcontinental railroad connected ocean to ocean. In its time, this event in Utah heralded a new era, and it remains an impressive achievement for man and technology. The Great West now lay open to phenomenal growth. Other transcontinental lines soon began construction and were finished by 1900.

### **“Robber barons”**

Even with several factors in place to promote economic growth—natural resources, a supportive Congress, improved transportation, and technological changes—the most essential and important ingredient was the emergence of the “go-getters,” the energetic, assertive visionaries. These men would assemble all the parts, form the corporations, and make an industry work. Sometimes called “captains of industry,” but more often labeled robber barons for their code of “unethics,” these men came to control major industries. Just as often, their successes were a result of good historical timing, luck, hard work, and questionable business practices. Besides the aforementioned Vanderbilt (steamships and railroads), others who dominated their industries included John D. Rockefeller (oil) and Andrew Carnegie (steel). Supremely self-confident and self-reliant, these “captains,” or “money masters,” amassed huge fortunes and won great power. Though the entrepreneurs and industrialists were a diverse lot of men, all of them were eager to seize unlimited opportunities from the business areas they saw emerging. Critics would call their efforts plundering.

### **A lack of ethics**

Along with Rockefeller, Vanderbilt, and Carnegie, men like Jay Gould, John Pierpont Morgan, and others lived and worked in an era before government regulation. They often took advantage of the government, the public, and their competitors. If they lacked a code of ethics and scruples, it was because, in their times, such behavior was accepted as natural. (Darwin’s “survival of the fittest” was a popular theory at this time.) Corruption, graft, and political scandal were also widespread in this era. Many entrepreneurs saw opportunities for great wealth and power, worth the risk of outrage from the public. Some believed the public benefited from business and corporations, however unethical, as they increased efficiency, lowered prices, and created jobs. At the same time, these robber barons ran legendary companies like Standard Oil and Carnegie Steel, two of the largest and most successful businesses of the time. As one wrote, “the American economy [in this era] ran on oil and had a backbone of steel.”

### **A deluge of inventions**

Even the Carnegies and Rockefellers benefited from the deluge of inventions that marked the era and came from the efforts of American ingenuity. These inventions helped spur industrial growth and inspired other inventors to swamp the U.S. Patent and Trademark office with patent requests. In all, between 1860 and 1890, over five hundred thousand patents were issued. First and foremost were the inventions that came from the fertile, restless brain (and New Jersey laboratory) of Thomas Edison. His electric lightbulb, phonograph, and a thousand other devices he patented had an incalculable impact on American life. Similarly, Alexander Graham Bell’s invention of the telephone altered world communication.

### **Cameras, razors, and flight**

Others' inventions were no less important. On a personal level, George Eastman introduced the lightweight Kodak camera and King Gillette came up with the safety razor with throwaway blades, making daily trips to the barbershop for a shave unnecessary. Perhaps as far reaching as the lightbulb or telephone, were the results of successful aircraft flights near Kitty Hawk, North Carolina by Orville and Wilbur Wright. The Wright brothers, problem-solving bicycle mechanics by trade, revealed the mysteries of aerodynamics. In doing so they launched the air age. Thus, the nation and the world, through the creative inventions of countless Americans, would never be the same.

### **A gilded age?**

In summary, the era of America's industrial boom was full of dramatic changes. Because of mechanization and the timing and hard work of visionary industrial captains, the American economy boomed. Many critics overlooked the progress and positive change brought about by machines to take pot shots at the often gaudy, gilded culture and lifestyles of the newly rich, who seemed to copy the worst aspects of upper-class Europeans. Mark Twain's novel *The Gilded Age* (gild is a thin layer of gold or gold paint, something artificial or phony) is an indictment of some of the era's unpleasantness: the graft and corruption of politicians, slippery schemes, greed, ostentatious home décor, and false glitter—"the age of jobbery," as one historian labeled the times.

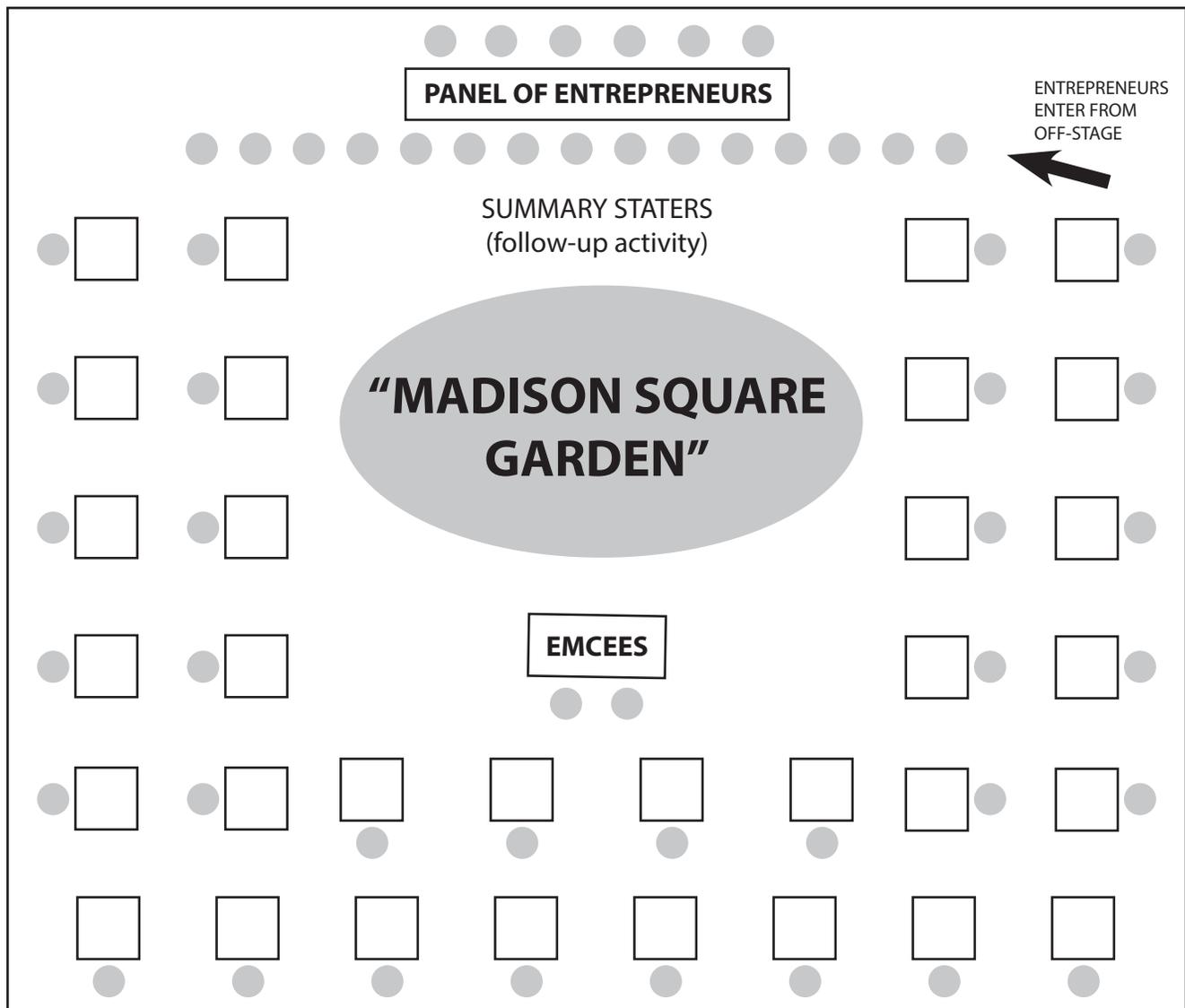
### **The era's legacy**

With critics and defenders on both sides, the years 1865–1910 did witness the American economy being superpowered by industrialization. As industry employed millions of workers, many of them newly arrived immigrants, it also increased the size of the middle class, produced scores of millionaire businessmen, helped urbanize the nation, created legendary companies, and arguably made the United States the world's wealthiest and most powerful economy through the next century. However, it also began an erosion of natural resources and perhaps a wider breach between the rich and the poor.

### **Become an American business icon or support one!**

"Icon" is defined as a person or object greatly admired; a symbol; a famous enduring person; an idol. These entrepreneurs were that—famous and, in most cases, worshipped as idols. They were the titans of the business world from 1865 to 1910. Be ready to take a role as one of these icons, a devoted booster, or an emcee, all key personnel in helping us to enrich our understanding of the Industrial Age. So get a ticket and enter the doors of famous Madison Square Garden to listen, learn, and participate in a history-making event!

# Schematic



## Suggestions

- Create ambience by putting up a banner (e.g., "Who Will Win the MVE?").
- Make name placards to put in front of each entrepreneur.
- Select your most reliable and dramatic students to play the entrepreneurs and emcees.
- Play appropriate music as icons are introduced.
- Insist on applause throughout.
- The audience should take notes.

## Characters needed

- 6 entrepreneurs
- 2 emcees
- 4–5 booster club fans for each MVE candidate
- 15 summary staters

# Overview

In this activity, several of you will get to know real late-nineteenth-century “go-getters,” people who became very successful and famous because they were—among other things—aggressive, resourceful, and energetic. Each will be showcased separately and will try to convince the listening audience that they are—by virtue of evidence and persuasion—the Most Valuable Entrepreneur (MVE) of the Industrial Age. First off, the entrepreneurs are fully prepared for the activity by their booster clubs. During the activity itself, an emcee keeps the presentations moving by following a script. As the six entrepreneurs respond to key questions, the audience will take detailed notes. Last, all of you will vote for the MVE.

## INTRODUCING THE SAVVY SIX

- **I am Cornelius Vanderbilt.** Of the six who made millions by being “go-getters,” I made my fortune first. Initially I, the “Commodore” (I was a skilled yachtsman), invested my money and energy in steamboats and then in railroads. As I did, the Vanderbilts became one of America’s richest families, and transportation east of the Mississippi River took a giant leap forward with my leadership.
- **I am John D. Rockefeller.** America’s great oil man—industrialist, I was the very epitome of a “robber baron.” Using unethical and often illegal methods to dominate and control the petroleum industry, I became “rich as Rockefeller” but I systematically gave away millions as gifts to institutes and medical schools, and set up permanent foundations.
- **I am Andrew Carnegie.** A Scotsman by birth, I immigrated to America just in time to help build railroads, bridges, and skyscrapers and become “the steel king,” earning countless millions of dollars. Like Rockefeller, but only more so, my “Gospel of Wealth” philanthropy topped \$350 million before I died in 1919.
- **I am John Pierpont Morgan.** America’s premier banker and financier of the Industrial Era, I made deals in these years that helped bankroll the nation’s industrial development. At one point, I floated loans to keep the U.S. government solvent and even brokered a deal to buy Carnegie’s steel company for nearly \$500 million! I also gifted museums and educational institutions.
- **I am Thomas Edison.** Clearly America’s original genius and inventor, I, Thomas Edison, was “the Wizard of Menlo Park.” With my invention of the incandescent lightbulb, I electrified America in the Industrial Age. I continued to make everyone’s life better with my over one thousand inventions, including the phonograph and the motion picture projector.
- **I am Richard Sears.** A tireless risk taker and marketing master, I, Richard Sears, became successful and wealthy using a policy of selling “everything you eat, wear, or use” in mail-order catalogs. Often imitating catalog leader Montgomery Ward initially, I advised customers to “send no money” (until later). Sears, Roebuck & Company now has well over a century of satisfied American shoppers.

# Sign-Up Roster

## Emcees

Mark Twain:

Alice Roosevelt:

**Vanderbilt:**

**Vanderbilt Boosters**

- 1.
- 2.
- 3.
- 4.
- 5.

**Carnegie:**

**Carnegie Boosters**

- 1.
- 2.
- 3.
- 4.
- 5.

**Rockefeller:**

**Rockefeller Boosters**

- 1.
- 2.
- 3.
- 4.
- 5.

**Morgan:**

**Morgan Boosters**

- 1.
- 2.
- 3.
- 4.
- 5.

**Edison:**

**Edison Boosters**

- 1.
- 2.
- 3.
- 4.
- 5.

**Sears:**

**Sears Boosters**

- 1.
- 2.
- 3.
- 4.
- 5.

# Booster Clubbers

You have been selected to be a booster clubber for one of the six entrepreneurs in this activity. Be loyal, be responsible, be supportive, and be a fan! Do these following tasks:

1. As a group, use the extra copies of your MVE candidate's **Profile Sheet** to read over the data, emphasizing in your group discussion the main points and what strategies would best bring victory to your candidate.
2. Share opinions and ideas in your club.
3. Ask questions of your candidate. Quiz your candidate on how well they know the entrepreneur's biography and achievements. Knowing details might just be the difference in swaying voters.
4. Make suggestions for how they should answer questions. Develop clever strategies.
5. Make a list of five reasons why you support your candidate for MVE and be prepared individually to state these reasons at the activity's end. To help you do this task, fill in the **Booster Club Commitment Sheet** together. Back a winner!

# Booster Club Commitment Sheet

We, the boosters of MVE candidate:

\_\_\_\_\_

Proudly endorse and enthusiastically support our candidate because . . .

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_
4. \_\_\_\_\_  
\_\_\_\_\_
5. \_\_\_\_\_  
\_\_\_\_\_

Signed:

\_\_\_\_\_  
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# Emcee Script

## Suggestions

1. Since you are the Master of Ceremonies (MC/emcee), it is important that you practice reading this script aloud several times before activity day.
2. Be responsible and play this role realistically. Your proper voice projection, body language, and professional attire are important elements in this activity's success.
3. Be positive, confident, energetic, and dramatic. Keep the show going! Be in charge!
4. With your teacher, decide if the questions during the interviews will be shipped out to the audience, instead of having you ask all the questions. If you do, this action will involve more students.

## Script

"Hello, and welcome everyone to our program—ICONS OF THE INDUSTRIAL AGE. Today, we'll interview and get to know six great entrepreneurs from America's Industrial Era (1865–1910). Each will be interviewed, giving arguments so that you in the audience can decide and vote for the Most Valuable Entrepreneur (MVE) from this time in U.S. history. Join me now and give your applause as I introduce our distinguished panel of celebrities—our famous entrepreneurs."

*At this point, the six MVE candidates introduce themselves using the **Overview** sheet, before they leave the room again.*

*Upon introduction, each candidate runs in and stands behind his chair along the panel.*

"Let's get these superstars in here! We'll start by introducing a man who made his fortune in steamships and railroads—Commodore Cornelius Vanderbilt!" (pause)

"Next, a big welcome for the oil man, John D. Rockefeller!" (pause)

"Our third guest is America's Steel King, industrialist Andrew Carnegie!" (pause)

"Our premier banker and deal maker is next. Say 'Hi' to John Pierpont Morgan!" (pause)

"Quick, someone turn up the lights for inventor of the lightbulb, Thomas Edison!" (pause)

"Our last guest became America's greatest retailer and mass marketer. Welcome Richard Sears!" (pause)

"Thank you all for being here today. Have a seat and we'll get started." (Allow time for the guests to sit down.)

"Our first guest made millions with steamship vessels and then invested early on in railroads. Let's welcome again the poster boy for the robber barons, Commodore Cornelius Vanderbilt!"

**Questions for Vanderbilt**

1. Cornelius Vanderbilt—may we call you “Commodore”? Tell us about your upbringing and the key events and influences that led you to your destiny.
2. So Commodore, how did you make your millions? What businesses did you dominate?
3. Why the jump from one industry to another? I mean, sailing vessels to steamships to railroad lines.
4. What traits are required to be a leader of an industry, a “go-getter,” and to reach the top? In other words, in your opinion, what do the six of you have in common? And why, according to some, are you the robber barons’ “poster boy”?
5. So Commodore, it’s time for you to sum up, or argue, your case. Why should we vote for you as MVE of the Industrial Age?

“Thanks, Mr. Vanderbilt. Next, we present the industrialist who made his billions in an industry he absolutely dominated, but he gave millions away to different causes. Let’s hear another round of applause for the oil man, John D. Rockefeller!”

**Questions for Rockefeller**

1. J. D., you’re the oilman, right? Tell us about your early life and how and why you got into the business.
2. Just what is oil and how important is it?
3. Your critics have made careers of taking shots at you, Standard Oil, and the methods you used to crawl to the top of the heap. What tactics did you use to destroy your rivals and why did you avail yourself of unethical methods?
4. How did you moderate or minimize the critics’ and muckrakers’ attacks?
5. So J. D., it’s time for you sum up, to argue, your case. Why should we vote for you as MVE of the Industrial Age?

“Well articulated, J. D. Next, let’s turn to a foreign-born entrepreneur. A Scotsman by birth, he came to America, and, through hard work and determination, became America’s ‘Steel King’ and our greatest philanthropist. Once again, here’s Andrew Carnegie!”

**Questions for Carnegie**

1. Andrew Carnegie, you’re the so-called Steel King, right? Tell us about your early struggles and how you got into the steel business.
2. Why is steel better than iron and what is the steel produced by your factories used for?
3. Critics over the last century have been merciless in making you out to be selfish, greedy, power hungry, unethical, and a really “bad boss,” despite your efforts to give America a steel “backbone.” Briefly, how do you answer these critics?
4. Besides being a steel entrepreneur, what else in your life is important? Are you a man of culture?

5. So now Andrew, it's time for you to sum up your case. Why should we vote for you as MVE of the Industrial Age?

"Your generosity will have an impact on the voters, I'm sure, Mr. Carnegie. Thank you. (*pause*)

When corporations and even the U.S. government needed financial help or advice in this era, they frequently called on our next guest. He bankrolled America's economic growth and by doing so became our premier banker and dealmaker. Let's greet again, John Pierpont Morgan!"

### **Questions for Morgan**

1. Mr. Morgan, or J. P., would you tell us about some of the pivotal events in your early life?
2. Your wealth and entrepreneurial enterprise were not earned running a company or corporation. How did you become successful?
3. Your biography seems to indicate that you "ran with the big dogs"—that you made deals with America's foremost companies and business legends—even the U.S. government. Share some thoughts about that.
4. What traits did you possess in your heyday that made you a "go-getter" and successful entrepreneur?
5. So John Pierpont Morgan, the floor is yours to sum up your case. Why should we vote for you as MVE of the Industrial Age?

"Spoken with conviction, Mr. Morgan. Our next guest is our lone inventor on the panel, but he was also a successful entrepreneur. Still, you all know him through his great inventions like the lightbulb. Welcome once more Thomas Edison!"

### **Questions for Edison**

1. Mr. Edison, our distinguished inventor and entrepreneur, justify, if you will, why you deserve to appear on this panel today—sitting with these business giants.
2. What trait appeared early on that an inventor like yourself must have, and what early experiences guided you to a career as an inventor-entrepreneur?
3. Tell us about your invention of the incandescent lightbulb.
4. Besides the bulb, what other inventions might we thank you for?
5. So Thomas Edison, now's your chance to brag. Tell us why we should vote for you as MVE of the Industrial Age? Make your case, sir.

"Will his role as America's greatest inventor help Edison win? We'll see. (*pause*) Our last entrepreneur became America's supreme marketer, a tireless retailer who gave his name to a phenomenally successful mail-order catalog business and a well-known department store chain. Another round of applause for Richard Sears!"

**Questions for Sears**

1. Richard Warren Sears. "Sears, where American shops!" That's you, is it? So how did it all start? There's a story about selling gold pocket watches to other railroad agents. Share with us this tale of how you seized your first business opportunity.
2. For years, your catalog was always anticipated by, and had a great impact on, Americans during the Industrial Era. Just how great was your catalog's impact?
3. What motivated you to get into the mail-order market and what did you see in rural, midwestern America that led you to be a marketer for this section of the country? Didn't Montgomery Ward dominate mail-order sales?
4. What personal traits did you have that made you an admired entrepreneur of a successful Chicago-based mail-order business?
5. So Mr. Sears, here's another opportunity for you to compete and emerge a winner. Tell us why you deserve to be the MVE of the Industrial Age over the others on this panel. State your casenow.

"Powerful words, Mr. Sears, and you may have convinced some voters. *(pause)* And there you have it, ladies and gentlemen. Our Icons of Industry have stated their cases for MVE. I ask the audience now to consider the arguments heard here today. Finish filling out your ballots. Which business celebrity deserves to be selected Most Valuable Entrepreneur? Will it be *(go down the line)* Vanderbilt? Rockefeller? Carnegie? Morgan? Edison? or Sears?"

*(Allow a minute or two for everyone to complete their ballots.)*

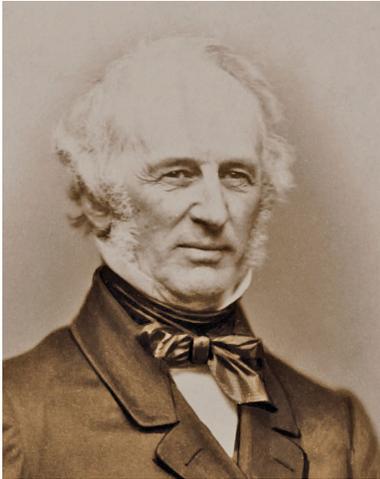
"Before we collect the first ballot, let's poll some individuals in our audience."

*(Have two or three students stand and state who they support and why. Then collect the ballots, count the votes, and announce the three top vote getters. Have a second ballot after letting the top vote getters restate their cases briefly. Dramatically announce the final MVE winner. As a final word, thank all participants and close the proceedings.)*

## MVE CANDIDATE

# Cornelius Vanderbilt

(1794–1877) Steamship and Railroad Man of the Industrial Age



Cornelius Vanderbilt

You will use the data below to enlighten the audience during the interview and to bolster your case for MVE (Most Valuable Entrepreneur) of America's Industrial Age.

## Your Biography

Of all the wealthy captains of industry in the mid- to late-nineteenth century, one set the pace and made his millions in business first: you—Cornelius Vanderbilt. Possessing character traits similar to Carnegie, Rockefeller, and others who came after you, you became one of America's wealthiest and most successful entrepreneurs. You did it by investing first in sailing vessels, then in steamships, and finally in railroads. In each case, you had a great sense of timing.

Having a crude and brusque manner, speaking with the tongue of "a sharp wharf rat," driven by ambition, and always looking for challenges and opportunities, you became for later generations the "poster boy" for the robber baron. Of Dutch descent, you were very enterprising as a youth. Your early efforts in business always seemed to center around boats and the water near your birthplace on Staten Island. You quit school at sixteen with a loan of \$100 from your parents to strike out on your first business endeavor. In exchange for a ride in your new boats, some friends helped you plow and sow eight acres of family farmland to pay back the loan.

Soon you were earning income transporting people and freight between New York City and Staten Island. To make the ferry business successful, you worked hard and charged appealing rates. During the War of 1812, you were able to earn U.S. government contracts to supply American forts around the New York area. Within five years, you had accumulated over \$10,000 and several sailing vessels. By then it was clear that you were headed for wealth and fame.

Abruptly, you sold all your interests in sailing to pursue similar success in steamships. In the next few years you were locked into competition with Robert Fulton and Robert Livingston. Despite the competition, and because of your drive and energy, the new Vanderbilt line became profitable.

Always looking for more ways to be successful, you moved your family (a wife and eventually thirteen children!) to New York City, where you entered the very competitive steamship service between New York City and Peekskill. Again, you emerged from these steamship "wars" a winner by cutting rates to as low as twelve and a half cents. Your efforts drove out the competition. Soon after, you opened up services to Boston and Providence. By the 1830s, your steamship business helped you accumulate over \$500,000, a princely sum in those days.

*Image Source:* Heritage Auction Galleries.

In typical Vanderbilt fashion, you chose to change business direction. One new venture, a freight and ferry service for people going to Nicaragua en route to the California gold fields, netted you over \$1 million. Your slashed rates drove out the competition.

Now, with even more impressive business credentials and the honorary title of “Commodore,” you, at the age of seventy, turned away from steamships and looked again for new opportunities. You found that opportunity in railroads. Throughout the 1850s and 1860s, you bought up railroad lines, improved their service, and consolidated your new empire. As a result, you amassed a fortune of over \$25 million. Soon, you were running trains to Chicago and acquiring lines in Michigan.

Forceful in personality, competitive, unafraid to take calculated risks, you were in many ways typical of the business giants who dominated America’s industrial emergence in the post–Civil War era. Yet, while Rockefeller and Carnegie gave away countless millions to many causes, you were never known to be as generous. However, you did fund a few churches and universities. Compared to the other “captains” (Carnegie gave away \$350 million), your efforts here seem meager indeed. Still, when you departed this world in January 1877, your legacy as a successful entrepreneur far outstripped the oil and steel empires the younger Rockefeller and Carnegie were still carving out in this era.

### Interesting Facts

- At the time of his death, Vanderbilt was worth about \$105 million, which, by 2017, was valued at about \$2.3 billion.
- Vanderbilt was no fashion plate, and many called him crude and shifty. Almost year-round, he wore a fur coat and a plug hat.
- Cornelius was the “daddy” of today’s famous Vanderbilt family of New York. A century after his death, Gloria Vanderbilt’s fashions for women were popular. The fashion maven’s mother married into the Vanderbilt family and took its name.

### MVE Arguments

Make your case using this and other data.

- First, you have to compare me to the other entrepreneurial giants on this panel and conclude that I was their example, their role model. I came first! Although I was not America’s first multi-millionaire (fur trade and real estate mogul John Jacob Astor probably has this title), my efforts earned me over \$100 million. In today’s currency, that’s about \$2 billion—a tidy sum. Keep in mind, both Rockefeller and Carnegie were still working on their fortunes when I left mine to my son.
- Second, I best exemplify the risk taking typical of this era’s entrepreneurs. I was a restless man, a seeker. When I sensed it was time to leave one industry for another, I did it. I saw the need to invest in steamships when the age of sailing ships had ended. Then I dropped steamships for the upcoming age of railroads.

- Third, I love challenges. My business interests were far ranging. Whatever business I chose to enter, I became supreme. I became invigorated by the “joy of combat”—by the new challenge of offering cheap, safe, and convenient public transportation—first in sailing vessels, then steamships, and finally in railroads.
- Fourth, I worked hard and earned a king’s fortune in transportation. I made it easy for restless Americans of my time to be mobile. In doing so, I inspired countless numbers of young people to frame their dreams and work hard to achieve those dreams. Someone once said, “Those who dream most, do most.” I was a doer as well as a dreamer. People of my era—before Rockefeller, Carnegie, Morgan, or Sears here (*point to them*)—respected the name Vanderbilt. I predate and outdid these other five.
- Last, I too gave away millions to charities and institutions. One New York church received a \$50,000 contribution. Also, I donated \$1 million to a southern university that now bears my proud name, Vanderbilt University. So I implore you to cast your vote for me. Remember this ditty:

J. D., Andy, and the others, too  
Will give you facts on which to chew  
But my case you really can’t ignore  
So put your “X” on the “Commodore.”

### Questions You Must Answer

1. Cornelius Vanderbilt—may we call you “Commodore”? Tell us about your upbringing and the key events and influences that led you to your destiny.
2. So Commodore, how did you make your millions? What businesses did you dominate?
3. Why the jump from one industry to another? I mean, sailing vessels to steamships to railroad lines.
4. What traits are required to be a leader of an industry, a “go-getter,” and to reach the top? In other words, in your opinion, what do the six of you have in common? And why, according to some, are you the robber barons’ “poster boy”?
5. So Commodore, it’s time for you to sum up, or argue, your case. Why should we vote for you as MVE of the Industrial Age?

### Costume/Flourishes

Most pictures of Vanderbilt were taken when he was an old man. He had wild hair and long, thick, white sideburns. As appropriate for nineteenth-century men, he wore a three-piece suit. He often wore an old fur coat and plug hat. Act aggressively and justify your fortune. Bring in a toy boat and model train to have the voting audience visualize your ventures.

## MVE CANDIDATE

# John D. Rockefeller

(1839–1937) Oil Man of the Industrial Age



John D. Rockefeller

You will use the data below to enlighten the audience during the interview and to bolster your case for MVE (Most Valuable Entrepreneur) of America's Industrial age.

## Your Biography

Few others of your time personify America's industrial development and great wealth and influence more than you, John D. Rockefeller. You helped transform a nation with your hard work, shrewd business tactics, and oil! For you, J. D., are America's greatest oil industrialist and philanthropist.

Born in 1839 in Richford, New York, you and your family soon moved to Cleveland, Ohio. There you grew up to be a thrifty, industrious, and enterprising young man. A series of jobs formed your character early on. Soon you entered the oil refinery business.

After the Civil War, the oil industry was just starting to boom. It offered, you believed, the best opportunity to achieve success and wealth. Also, it seemed a safe investment with little risk. You used these advantages and great timing to found Standard Oil and bring order to a chaotic industry. Your reward: control of the oil refining and distribution business and a fortune like the world has rarely seen.

In those postwar years, America was hit by the Industrial Revolution; machines were changing the world and the American economy. Oil—a fossil fuel with seemingly little use beyond stoves, lamps, and wall mortar—would be used to lubricate machines; to power cars, buses, trucks, airplanes, and electric generators; and to create paints, plastics, and even medicines. Your “black gold,” once refined from crude oil, or petroleum, soon ran the economy and helped the United States become the world's great industrial power.

Many critics questioned your business ethics, and they had plenty of ammunition. While not illegal in your time, your secret deals and methods to ruin your competitors in the oil business remain shameless and unethical. In fact, a favorite nickname for you that your critics loved to use was John D. “Reckafellow.” Many of your rivals were indeed destroyed by one of your tactics, the rebate. A rebate was money paid back to you by a freighting company after you promised to transport all of your oil barrels, a large volume, exclusively at a lower price. Your competitors, with less volume, soon went out of business when they couldn't hold out as long and keep up with you. To you, the rebate, secret deals, and other tactics were just methods to get control of the industry, to bring to it order and stability.

You never conceded wrongdoing and often justified your success by saying, “God gave me the money.” The fortune “given” to you (and other “robber barons”) was not frittered away. You lived

*Image Source:* The Rockefeller Archive Center.

“simply” and during your life chose to gift millions of dollars to charities, institutes, colleges, and foundations. Your philanthropy and the “gospel of wealth” philosophy over the years somewhat moderated all the criticism of you. Your own mortal life ended in 1937, but Standard Oil and the many endowed foundations, colleges, and institutes live on as your legacy.

### Interesting Facts

- J. D. had a practitioner of homeopathy as his personal physician. Homeopathy has been compared to faith healing and spiritualism.
- To soften his public image, J. D. willingly posed for photographers as he handed out shiny dimes to children on the street.
- A fundamentalist Christian, J. D. and his wife did not allow smoking, alcohol, or profanity in their “houses.” John Jr. had to take a lifetime oath to abstain.

### MVE Arguments

Make your case using this and other data.

- First, all the “ammunition” the critics used against me over the years was not fair or accurate. I never broke a law. Some of the tactics I used—though not exactly ethical—were accepted practices in my day. Ida Tarbell, and others, tried to portray me as a villain, one who exploited the government and the public to gain wealth. They wrote that I high-pressured people to make secret deals for my “monopoly,” Standard Oil. Not true. I was a positive and productive force in America’s industrial Age. I paid my workers well and had few labor disputes.
- Second, I was successful and made a pile of money because I worked extremely hard, was single-minded, took risks, and had some luck with timing. I rode the economic boom; I will admit that. The oil refining and oil distribution business was wasteful, inefficient, and chaotic. It needed a strong hand. I am a believer in Darwin’s theory of the survival of the fittest—someone who is better, stronger, and smarter than the rest. The country was and is better off because of my decisive and proactive role in the oil industry.
- Third, I brought my vision to the oil business. Very few could see that oil was going to be the important resource for the machine age we were entering. I was that visionary, although I, too, am surprised at the continuing importance of oil and petroleum products like gasoline well into the twenty-first century. In any case, I helped fuel a nation for 150 years.
- Fourth, I have been a role model as well. I was—I’m proud to say—America’s first billionaire! Many young people, enterprising and ambitious like me, read my personal story and model their careers and lives on my example. My personal traits of thrift, hard work, a sense of mission, and vision have inspired generations of future business leaders.
- Last, despite the critics who continue to lambaste me and the methods I used to scratch my way to the top and run my oil empire, I deserve the coveted MVE award perhaps more than the others here because of my philanthropy. Even as a young lad I believed in tithing (10 percent) to charities. My giving was a lifelong habit. After attaining great wealth, I upped my

contributions. Frederick T. Gates helped organize my financial gifts, which eventually totaled over \$500 million. On the receiving end were mostly colleges, medical research facilities and medical schools, sanitation commissions, and the famous Rockefeller Foundation. It was my belief, like Mr. Carnegie here, that the rich have an obligation to help the public, the “gospel of wealth” as Andrew has called it.

- Again, review my legacy as accurately as I would my company’s account books. Then you will conclude that:

My oil has fueled the old USA  
From 1870 to our present day.  
Vote Rockefeller—he deserves to be  
This Industrial Era’s MVE.

### Questions You Must Answer

1. J. D., you’re the oilman, right? Tell us about your early life and how and why you got into the business.
2. Just what is oil and how important is it?
3. Your critics have made careers of taking shots at you, Standard Oil, and the methods you used to crawl to the top of the heap. What tactics did you use to destroy your rivals and why did you avail yourself of unethical methods?
4. How did you moderate or minimize the critics’ and muckrakers’ attacks?
5. So J. D., it’s time for you sum up, to argue, your case. Why should we vote for you as MVE of the Industrial Age?

### Costume/Flourishes

From pictures, it appears that Rockefeller was always well dressed and topped off his attire with a bowler hat and a watch chain. Consider passing out shiny dimes to other candidates or the audience. Perhaps open a can of motor oil and explain what it is used for.

## MVE CANDIDATE

# Andrew Carnegie

**(1835–1919) Steel King of the Industrial Age**

Andrew Carnegie

You will use the data below to enlighten the audience during the interview and to bolster your case for MVE (Most Valuable Entrepreneur) of America's Industrial Age.

**Your Biography**

Someone wrote that the Industrial Age in America ran on oil but had a backbone of steel. You, Andrew Carnegie, supplied this steel from your factories around Pittsburgh. Through your efforts, you became one of the richest men in the world, a generous philanthropist, and perhaps America's most famous and successful immigrant.

Born in Scotland in 1835, you and your family immigrated to America in 1848. Settling near Pittsburgh, you worked at various jobs to increase the family's low income: as a bobbin boy, a messenger in a telegraph office, and eventually a secretary and then superintendent for a railroad company. During this time, you displayed character traits that would make you successful: hard-working, assertive, insatiably ambitious, with boundless energy, a love of money and power, and a desire to improve yourself as a cultured person. Along the way, you acquired a lifelong interest in literature, music, history, and the theater.

Traveling in England as a salesman for some railroad companies, you saw for yourself the changes occurring in the steel industry. Because of the new Bessemer iron purification process, steel was now made cheaper, stronger, and more durable than iron. Once back in Pittsburgh, you decided to be a steel man and you soon self-financed the building of factories for the production of steel. "My decision," you later wrote, "was taken early. I would concentrate upon the manufacture of . . . steel and be master at that. The day of iron has passed. Steel is King!"

Over the next decades, your steel was turned into bars, sheets, and strips for railroad rails, girders and beams for construction of buildings (the new skyscrapers), bridges, and thick plates for naval ships. Also, your factories fashioned steel into pipes, rods, tubes, and wire for hundreds of factory and household products.

From 1873 to 1901 you were the leading industrialist and undisputed Steel King. You became a pacesetter entrepreneur in the dog-eat-dog world of business in the Industrial Age—maybe the shining example of a "captain of industry." Critics of the ways in which you acquired more power and wealth now called you a "robber baron." Despite this, your steel empire became enormous. Carnegie steel products eventually circled the globe to be an important part of the world's growing economies.

So successful was your company, year in and year out, that your salary soon reached \$2 million annually, a huge amount in those days. By 1900, about the time you sold Carnegie Steel Company, your personal income was \$25 million a year! Driving out rivals by cutting prices, plowing earnings

*Image Source:* Courtesy of the Library of Congress, cph.3c01767.

back into the company, keeping costs down, and taking on important partners (Henry Frick and brother Tom) and a general superintendent (William Jones), you were in control of the entire industry, even buying rights to rich iron ore deposits in Minnesota's Mesabi Range.

Though obsessed with success, every summer you returned to live in Scotland. Also, you took time away from the factories (where you were top salesman) to be tutored in literature, philosophy, economics, history, and French. You joined discussion groups, cultivated friendships with famous world figures, and even became a popular, dramatic, and sought-after public speaker. You finally married in 1887 at the age of fifty-one, and your daughter was born in 1897.

While your life appeared to be ideal, labor unrest in the 1880s and 1890s caused you to reconsider a decades-long desire to sell the company, retire, and start a new career as a "distributor of wealth" (philanthropist). You once said, "A man who dies rich, dies disgraced." So you sold the company to J. P. Morgan in 1901 for \$480 million and embarked on this new endeavor, donating over \$350 million (more than \$9.6 billion in today's dollars), mostly to start free public libraries, churches, concert halls, and Scottish universities. However, you kept enough for yourself and the family; a castle in Scotland with eighty-five servants certainly helped remind you of the lavish lifestyle you earned. Your death came at age eighty-three in 1919.

### Interesting Facts

- At age thirty-three, Andrew Carnegie vowed not to worship money. But for another thirty years he worked hard and lived extravagantly before deciding to give much of his fortune away. Yet one biographer called Carnegie "the greediest little gentleman ever created."
- Carnegie hated war, yet his steel mills made the armor plates for battleships that were used by rival nations in the First World War.
- Through his philanthropy, Carnegie appeared to love humankind. The record shows, however, that he apparently did not love the ones who worked for him. He made his employees work long hours, often in bleak conditions, and was blatantly anti-union.
- Carnegie was short in stature at five feet, three inches (Someone once called him the "little Scot.")

### MVE Arguments

Make your case using this and other data.

- First, I face all my critics, including historians, who write that I was greedy, selfish, obsessive about money and power, and say in my defense that so many others benefited from my success. I hired thousands of American workers, and they in turn provided for their families and became lifelong consumers of American products.
- Second, my rags-to-riches story makes a powerful and inspirational example for everyone who wants to succeed. I worked very hard, planned my decisions carefully, was a master of organization, and did everything possible to fulfill my dreams—even if money and power were the results, or fruits, of my labors.
- Third, some said I was a "bad boss," a heartless, uncaring employer, that I fought the influence of unions in the steel industry, and that during the Homestead Strike of 1892, I chose to stay

in Scotland while my hired Pinkerton security force battled workers and killed some of the strikers. But keep this in mind: I plowed much of my company's profits back into the company and through the cycles of depressions and recessions, kept my workers on the job. Compare my record with the other business giants of my era. I was not a heartless employer.

- Fourth, I built America. My steel company supplied the steel for the construction of its railroads, skyscrapers, bridges, and naval ships—all over the world! We did this for decades. Can anyone on this panel say that? Instead of castigating me for my “inflated” salary—my greediness—focus on my contributions as a captain of industry, providing America's steel backbone for decades.
- Last, I deserve the MVE award for all the reasons above and also for my unequalled stewardship, or philanthropy. I believe that philanthropy is the obligation of the rich—to give back their wealth to the less fortunate. I call it the “gospel of wealth,” and it provided me with the responsibility to “improve mankind.” Even though I exhibited qualities that made me rise above the average person, I still believe I showed Christian charity by distributing what I have been so blessed with. Therefore, I systematically donated over \$350 million, mostly to start local public libraries. But I also helped churches and funded concert halls (Carnegie Hall in New York City) and even Scottish universities. How I made my fortune should not taint my philanthropy.
- So I ask that all of you (*look at the audience*) review my contributions to America's economic and social growth. Surely, you will judge my worth.

From Scotland, I came  
with grit and zeal.  
America was soon built  
With Carnegie Steel!

### Questions You Must Answer

1. Andrew Carnegie, you're the so-called Steel King, right? Tell us about your early struggles and how you got into the steel business.
2. Why is steel better than iron and what is the steel produced by your factories used for?
3. Critics over the last century have been merciless in making you out to be selfish, greedy, power hungry, unethical, and a really “bad boss,” despite your efforts to give America a steel “backbone.” Briefly, how do you answer these critics?
4. Besides being a steel entrepreneur, what else in your life is important? Are you a man of culture?
5. So now Andrew, it's time for you to sum up your case. Why should we vote for you as MVE of the Industrial Age?

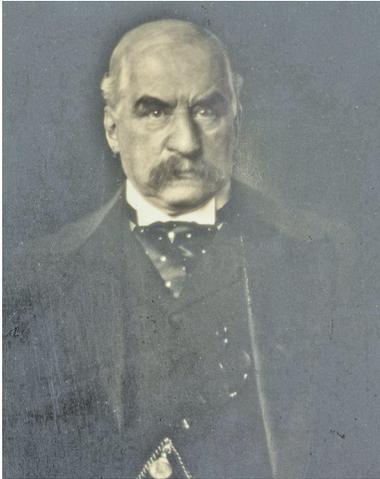
### Costume/Flourishes

From pictures, you'll notice that Carnegie wore three-piece suits and for most of his adult life sported a luxuriant (but trim) full white beard. Practice and use a Scottish accent. Demonstrate the wonders of steel.

## MVE CANDIDATE

# J. Pierpont Morgan

(1837–1913) Banker of the Industrial Age



J. Pierpont Morgan

You will use the data below to enlighten the audience during this interview and to bolster your case for MVE (Most Valuable Entrepreneur) of America's Industrial Age.

## Your Biography

You just might be America's greatest and most influential banker ever. You were a key player in most of your era's big business deals. Remarkably, you even bailed out the U.S. government—twice!—during hard times. Although you never reached the personal wealth of the other giants of the time, the name J. P. Morgan nonetheless was a powerful financial force. You were born in Hartford, Connecticut, in 1837 to a father who was well on his way to his fortune in the dry-goods business. When he later switched to international banking, you joined him, after attending college in Germany, getting a running start on your own wealth. At age thirty-four, you helped reorganize dad's banking firm. Eventually the firm became J. P. Morgan and Company, or The House of Morgan.

The heyday of your banking career came in the 1890s and early years of the twentieth century. By then, your firm was a leader in financing American business and in marketing bond issues of the U.S. government. Not every deal paid off handsomely and added luster to your name. When you tried to reorganize America's railroads in the 1890s, the government stepped in to stop you. Eventually the Supreme Court—pushed by President Theodore Roosevelt—ordered your Northern Securities Corporation to be dissolved.

The same government that dissolved your company needed financial help from the House of Morgan, and twice you came to its aid. In 1895, your firm was able to replenish the Federal Reserve with millions of dollars in gold, helping to preserve the redeemability of U.S. Treasury notes. Again, in 1907, J. P. Morgan and Company loaned money to U.S. banks to prevent financial panic.

In 1901—maybe your biggest deal—you were instrumental in brokering the sale of the huge Carnegie Steel Company for \$480 million and turning it into the U.S. Steel Corporation. Soon, other large companies sprang from your financial involvement: International Harvester, American Telephone and Telegraph, and General Electric. In addition to your momentous financial deals, you and some of your associates were chosen to serve as directors of major American corporations, banks, railroad companies, public utilities, and insurance firms. Always controversial in your reign as the nation's financial czar, you were "slapped" by the government a few times. Besides the Northern Securities case, you were also investigated by Congress because of your widespread influence and reach, and some other business improprieties. Little real incriminating evidence was uncovered.

In all, your organizational talents, leadership, and adroit decision-making skills were mostly a stabilizing influence on the economic and political events of the day, in contrast to the unsavory

*Image Source:* Public domain, via Wikimedia Commons.

deals and tactics of the robber barons and raiders like Jay Gould. Of course, your positive efforts gave you further influence and opened up more opportunities for greater wealth.

Although your cantankerous disposition, regal manner, arrogance, and quick temper made for a poor public image (you once said, "I owe the public nothing"), you nonetheless gave back to society. Like other wealthy entrepreneurs of the day, you chose to give some of your fortune to charities and institutions. You divided most of your gifts between your Episcopal church, New York hospitals, and the Harvard Medical School. Similarly, you used your reputation and wealth to collect great art, which you frequently gave to museums and libraries. Some valuable statues, books, coins, paintings, and furniture eventually served as a foundation for the Metropolitan Museum of Art in New York City.

Being often under scrutiny by Congress and having to deal with a poor public image didn't make life for you very easy. A lifelong skin disease on your nose and a never-far-off nervous breakdown added to your frustrations. Yet none of these elements detract from the fact that you were America's "financial disciplinarian." You acted as mediator for a generation of business deals. J. P. Morgan could be trusted to fix money problems. Take a failing company or a struggling government and some capital and you, J. P., could turn it around.

### Interesting Facts

- Morgan had a passion for sailing yachts and with his own yacht, the *Columbus*, won several competitions, including America's Cup.
- Despite his disinterest in money, in 1912 Morgan spent \$60 million on art—that's over a billion dollars in today's currency!
- Called the "Napoleon of Wall Street," Morgan was driven around the city in a Rolls-Royce.

### MVE Arguments

Make your case using this and other data.

- First, I am a candidate for MVE not because I'm the wealthiest—as if that should ever be a reason to choose a "most valuable" anything. A few of these moguls here were probably worth eight to ten times as much as I was. I'm a strong candidate because I was the era's foremost banker. I made the deals that made my era's entrepreneurs wealthy. I underwrote the creation of such corporations as General Electric and International Harvester. In fact, I bought Carnegie Steel for \$492 million and then managed the formation of U.S. Steel. I excelled in finance and deal making. No one did it better. So I was paid well for my expertise. But—no biggie—I was practically born rich.
- Second, I was the supreme example of what a banker should be and this example set the standard for perfection, sobriety, and inscrutable behavior today. Most all bankers are well dressed, well trained, organized, and professional. While I admit that I barked at a few underlings who made mistakes, and I displayed at times impatience and arrogance, nevertheless, my record and leadership as a dependable, trustworthy, and skilled banker were irrefutable. Congressional investigations into my deal making never found any improprieties.

- Third, I exhibited my duty as a citizen when I bailed out the U.S. government, twice, in 1895 and 1907. I wanted a stable economy, to eliminate the boom and bust cycles, the price wars, and the waste. In addition, I wanted to end the wild speculation and unbridled competition. I concluded that what was good for Wall Street and the House of Morgan was good for America. My actions demonstrated that I was the nation's "financial disciplinarian." Also, I served on the boards of directors for several corporations, lending my time and knowledge to banks, railroad and insurance companies, and public utility firms. I was also a prime mover in getting European capital into U.S. investments.
- Fourth, I made many financial contributions and gifts to charities, hospitals, and educational institutions. One large sum went to the Harvard Medical School.
- Fifth, I was responsible for stocking America with great art and antiquities. I love European culture. On my many trips to Europe, I bought and brought back to America a treasure trove of art, including the Old Masters. But I also purchased sculpture, tapestries, furniture, bronzes, jewelry, coins, armor, rare books, illuminated manuscripts, Gutenberg Bibles, Chinese porcelains, and artifacts from the ancient Near East. Much of this art was housed in the New York Metropolitan Museum of Art.
- So beat that list of reasons, fellow entrepreneurs! I deserve the honor of MVE—if the voters really look at the evidence.

Deal maker, financier, and certainly more

Working to stabilize the economy's core.

The data you've heard will get you to hanker

For Morgan—the era's entrepreneur and best banker!

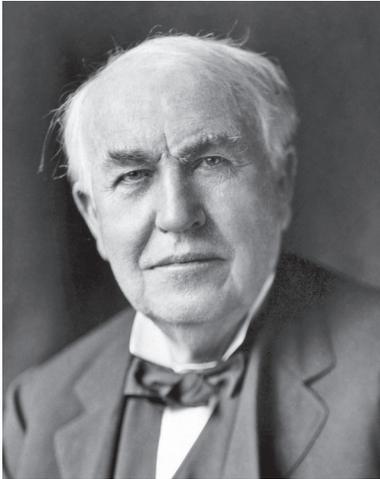
### Questions You Must Answer

1. Mr. Morgan, or J. P., would you tell us about some of the pivotal events in your early life?
2. Your wealth and entrepreneurial enterprise were not earned running a company or corporation. How did you become successful?
3. Your biography seems to indicate that you "ran with the big dogs"—that you made deals with America's foremost companies and business legends—even the U.S. government. Share some thoughts about that.
4. What traits did you possess in your heyday that made you a "go-getter" and successful entrepreneur?
5. So John Pierpont Morgan, the floor is yours to sum up your case. Why should we vote for you as MVE of the Industrial Age?

### Costume/Flourishes

Morgan was a large, heavy man with thick eyebrows, piercing eyes, a bad comb-over, and a big red nose that displayed a skin disease. He used a cane to walk and to keep away reporters and photographers. Perhaps while being interviewed, you could explain banking, loans, or how to put a business deal together.

## MVE CANDIDATE

**Thomas A. Edison****(1847–1931) Inventor/Genius of the Industrial Age**

Thomas A. Edison

You will use the data below to enlighten the audience during the interview and to bolster your case for MVE (Most Valuable Entrepreneur) of America's Industrial Age.

**Your Biography**

Some might argue that in the strictest sense of the word "entrepreneur," you, Thomas A. Edison, would not qualify for this panel. In their defense, you really didn't win fame and fortune as a businessman. Others, like Rockefeller and Carnegie, amassed millions, even billions, over their careers. In a more flexible application of the word "entrepreneur," you were a businessman, you worked tirelessly, and you produced items involving commercial risk. Additionally, you organized and managed a research laboratory business with nearly one hundred employees. You earned a "small" fortune for your efforts.

All this success and profit came from several spectacular inventions that sprang from your fertile brain. These devices unquestionably altered the way humans live. Among these inventions are the electric lightbulb, the phonograph, and the motion picture camera. In short, you were responsible for starting the "electric age." Now—if truth be told—you need to take your place in front of the overrated robber barons that sit ingloriously alongside you today. In fact, you feel that you and a few fellow inventor-entrepreneurs like Alexander Graham Bell and the Wright brothers are far more important—more valuable—than these so-called "captains of industry."

You were born in Ohio in 1847. As a child, you exhibited traits that led to a life of creative invention, notably curiosity and energy. At an early age, you wondered how things worked, which generated interest in experimentation. At school and at home you were always asking questions. You were encouraged by your mother to follow your "bent." In your early twenties, you worked at a telegraph office. This experience led you to your first invention: a vote-recording machine. To protect your invention, you took out a U.S. government patent, the first of over 1100 patents in your career.

Soon after you began work on your masterpiece invention, the incandescent electric lightbulb. Endlessly experimenting (and mostly failing), snatching sleep in two- to four-hour catnaps, you doggedly and tirelessly ran one trial after another, testing over six thousand organic fibers, hoping for a "happy accident." Finally, one experiment worked; the bulb burned for fourteen continuous hours. Within months after your success, America began to be "electrified" with artificial light. Primitive and dangerous candles and gas lamps would nearly disappear.

Inventing the lightbulb at age thirty-two brought a degree of fortune and fame, helping to fund your work for the rest of your life. As the "Wizard of Menlo Park," you and your laboratory-workshop became a showplace of organized scientific research. You rarely worked alone, preferring to pool

*Image Source:* Courtesy of Library of Congress, cph.3c05139.

brainpower from many assistants. Perhaps as many as eighty experts were on staff at the lab, including chemists, mathematicians, and physicists. All of you worked hard and this fact brings to mind one of your famous quotes, "Genius is one percent inspiration and ninety-nine percent perspiration."

Although it would be hard to top the lightbulb in importance and bring you more fame, amazingly you went on to invent other devices. Soon you improved the stock market ticker, a vital machine used by Wall Street brokers. For this you were paid the sum of \$40,000, a huge amount in the 1880s. Your work improving the telegraph earned you another \$30,000, from an appreciative Western Union. Interestingly, you made lots of money but always seemed short of cash. You spent vast sums on equipment and new workers. Being strapped for money did not seem to halt the pursuit of more projects and inventions. You worked on Bell's telephone and made it clearer, using a transmitter made of carbon.

Remarkably, you invented or improved devices through the years with a disability. You were hearing impaired, damaged by a childhood bout with scarlet fever. As you aged, the loss of hearing grew worse. Not discouraged, you turned it into an advantage. As you continued to work you learned to block out noise and distractions, allowing you to fully concentrate on your devices and machines.

Over the next years more inventions poured out of your now famous Menlo Park lab. In 1877, you invented what became the phonograph. Once in use, this allowed people to reproduce and record their voices. Even rural families in America could now listen to the latest sermons, popular tunes, and Sousa marches when they bought the cylinder to accompany this "graphophone," aka "Edison's Machine." In your opinion, the phonograph was your greatest invention. This particular invention sealed your reputation as a "hero" and national celebrity. An invitation to the White House for a demonstration of the phonograph became a cherished memory.

Following the phonograph came other practical and useful devices. The kinescope, a projector machine, was patented in 1891. It was used to make and show films. Between 1895 and 1927, you created the fluoroscope (enabling surgeons to perform the first x-ray operation) and you perfected the alkaline storage battery.

A pinnacle in your life came in 1929 in Detroit, where a celebration to open Henry Ford's historical village brought notables also to honor you. Present were President Hoover, car maker Ford, Madame Curie, and flight pioneer Orville Wright. From then until your death in 1931 at age eighty-four, you were generally too ill with diabetes and kidney disease to work. By that time, because of you, America was illuminated by electric lights and your devices and machines were universally in use. During your productive career, the United States became the most technologically advanced nation on the planet.

### Interesting Facts

- Edison often worked forty to fifty hours straight while on major projects. Usually he slept and catnapped for two to four hours at a time to restore his incredible energy.
- Edison married twice. His first wife, Mary Stilwell, died in 1884, after thirteen years of marriage. Their two children were nicknamed "Dot" and "Dash" after the telegraph signals. He married again and fathered three more children.

- To test the phonograph's success, Edison repeated the rhyme "Mary Had a Little Lamb" over and over until these first sound waves could be clearly heard when played back on the machine.

### MVE Arguments

Make your case using this and other data.

- First, although I was primarily known as an inventor, I ran a successful business. Most assuredly, I was an entrepreneur. Unprofitable commercial ventures did not interest me. I always wanted to reap financial benefits from my inventions. I managed my Menlo Park laboratory-workshop in New Jersey skillfully. Nearly a hundred scientists and assistants worked for me in teams that best utilized their talents and skills. I pioneered this kind of operation and my successful laboratory-business became a showpiece of organized scientific research. My employees carried on my legacy. I personally funded most of the costs running the business. I took enormous risks in doing so.
- Second, one has to look at my contributions in evaluating how valuable a person is. We all know Rockefeller, Carnegie, Vanderbilt, Morgan, and Sears made millions, even billions, in business. But I made money, too. They dominated their fields, but so did I. While one may occasionally use oil, steel, a ship or train, or a bank, you turn on my lightbulb several times a day. I worked tirelessly to bring light out of darkness. Consider my phonograph and my motion picture machines. I also developed a system of wide and efficient power distribution from central electric generating stations. What can possibly compare to these creations of mine?
- Third, my invention of the practical and useful incandescent electric lightbulb helped generate success for the industrialists on this panel. I wonder if they have thought of this? All of them relied, after 1875, on my electric bulb to light their factories, offices, warehouses, and trains—so they could work their employees around the clock. This fact helped significantly increase their productivity and profits. They owe me—BIG TIME!
- Fourth, I made a small fortune as an entrepreneur—not as much as some, but a lot of money. I should have made more on my inventions. I poured much of it into research, equipment, and the hiring of new workers in my lab. This generous allocation of personal funds should be noted as you vote. I also formed a company that eventually became General Electric, a proven and still successful public utility company in the twenty-first century. Early on, I was the principal stockholder.
- Fifth and last, I am America's archetypal inventor and genius of technology. I am usually the first person people think of when they think of inventors and geniuses. So look at my record and my contributions. The lightbulb in your head should illuminate my advantage over the others.

Edison! Edison!  
Vote for the man.  
He erased darkness  
Throughout this great land!

**Questions You Must Answer**

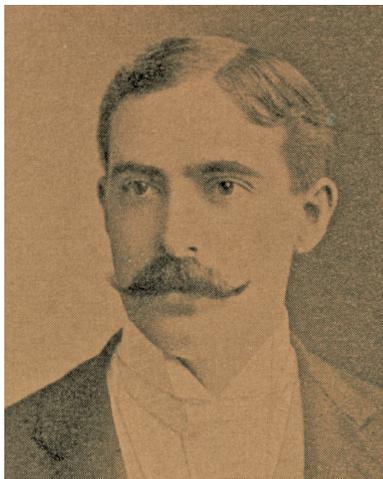
1. Mr. Edison, our distinguished inventor and entrepreneur, justify, if you will, why you deserve to appear on this panel today—sitting with these business giants.
2. What trait appeared early on that an inventor like yourself must have, and what early experiences guided you to a career as an inventor-entrepreneur?
3. Tell us about your invention of the incandescent lightbulb.
4. Besides the bulb, what other inventions might we thank you for?
5. So Thomas Edison, now's your chance to brag. Tell us why we should vote for you as MVE of the Industrial Age? Make your case, sir.

**Costume/Flourishes**

You'll note from old photos of Edison that he usually looked relaxed, maybe tired. He had white, disheveled hair and wore—as every man did—a three piece suit. No doubt a primitive hearing aid or small horn accompanied him when he went out. Perhaps you could bring in a common lightbulb and explain how it works.

## MVE CANDIDATE

# Richard W. Sears

**(1863–1914) Mass-Market Genius of the Industrial Age**

Richard W. Sears

You will use the data below to enlighten the audience during the interview and to bolster your case for MVE (Most Valuable Entrepreneur) of America's Industrial Age.

**Your Biography**

For a while, you, Richard Warren Sears, were the most widely read writer in America. Your works reached tens of millions of people. Your words were read aloud to sick children. It was said that sailors even took your books to sea to fight boredom. To farmers in America's heartland, your catalogs—the Sears, Roebuck catalog—filled countless hours and made isolation seem less of a burden. Pages from your old catalogs sometimes substituted for toilet paper on the frontier. For years, you wrote nearly every word of the ads which dazzled every reader. As a result, the effect your catalogs

had on America from 1890 on was incalculable. These catalogs became the farmer's bible, the Wish Book, and the Dream Book for a generation, and they revolutionized life and culture for most of rural America. At the same time, the name Sears gained instant recognition and eventual longevity.

Born in Minnesota in 1863, you left high school early to be the family breadwinner. For a time, you worked as an auditor, then as an agent and manager at a railroad depot. These jobs gave you experience and some money to start your own business when an opportunity arose. That opportunity came when a manufacturer mistakenly shipped gold watches to a local merchant who did not order them. When the merchant refused to pay for the shipment, you stepped in and bought the watches for twelve dollars each and began to sell them for fourteen dollars to other agents grappling with the newly instituted time zones for railroads. You offered a money-back guarantee to the agents with good credit. Within six months, you had made a profit of \$5000.

Soon you quit the railroad and moved to Minneapolis, then to Chicago to seek bigger projects, all the while buying and selling inexpensive watches. In 1886, you established the R. W. Sears Watch Company. A few years later, you sold the company and briefly "retired" to Iowa. Restless and full of entrepreneurial ambition, you abandoned retirement and formed a company with Alvah Roebuck—Sears, Roebuck and Company. Your next decision, to enter the competitive mail-order business, came from your desire to challenge the powerful Montgomery Ward Company, which had dominated this particular market. Ward himself knew that Americans were dissatisfied with the high prices and limited selection of goods offered by local merchants in small-town stores. The mail-order giant promised customers who were reluctant to buy sight-unseen goods that "satisfaction [was] guaranteed—or your money back!"

The idea of challenging Montgomery Ward attracted you. You needed to take bold risks, declaring to others, "That's the game I want to get into." Never really evaluating the risk, you became an "entrepreneurial daredevil." Soon you were plunged into debt to expand your operations. In 1894,

Image Source: Courtesy of Library of Congress, LC-DIG-ds-06752.

your first catalog was mailed out—a five-hundred–page tome with thousands of listings, all written by you. Utilizing the marketing techniques pioneered by Ward, you found almost immediate success, even with the competition for lower prices with Ward’s company. You went beyond what the rival company did. At times, you exhibited a flair for improvisation, especially in advertising. You tried just about every promotional idea imaginable, including rebates, sweepstakes, and pyramid schemes.

Before long, you had earned the trust of rural Americans, who were nearly always suspicious of big-city businessmen. You allowed your mail-order customers to examine items before paying for them. Your “send no money!” policy, along with a simplified ordering process, attracted customers. Additionally, you proclaimed with some exaggeration that your catalog goods—even the inexpensive ones—were “the best in the world” and would “last forever.” These claims were in line with the unregulated deceptive and misleading advertising and the “buyer beware” principles of your day. Eventually, you offered more quality items and truth-in-advertising in the catalog. Before long, many of your contemporary businessmen were calling you a marketing genius. One said, “I think he [Sears] could sell a breath of air.” You never let up; your ads were everywhere—in newspapers, literary journals, magazines, trade union ad farmer publications, and church newsletters.

The bulk of your business came from the catalogs that were mailed to farm families in the heartland. Here, your semiannual catalogs served as a store window for every imaginable product, from shotguns, pianos, stoves, and entire houses to corsets, apple peelers, and freckle cream—at one point over a hundred thousand listings. You tapped into a huge market and brought the world to the farmer’s doorsteps. In 1896, you received an economic boost when the U.S. Post Office decided to send your catalogs into these often isolated regions of the country Rural Free Delivery. That same year you took on a new partner, Julius Rosenwald, who brought stability and innovation to the company. (Earlier partner Roebuck had been bought out for \$25,000 in 1895.)

Few duplicated the business successes you experienced as America’s supreme mass marketer. When your new headquarters in a Chicago skyscraper opened up in 1906, over nine thousand employees reported for work. Thanks to your bold, impulsive, tireless efforts, you made Sears, Roebuck and Company the largest retailer in the world, “an economic colossus.” In 1908, you retired again. By 1910, your products were in every nook and cranny of the country. At the time of your death at age forty-nine in 1914, you were worth \$17 million, a quantum leap from the \$50 investment in misordered watches in 1886 Minnesota. Sadly, you never really slowed down enough to enjoy the fruits of your labors. However, your legacy is assured. Sears, Roebuck and Company has been a familiar American institution and successful business well into the twenty-first century.

### Interesting Facts

- Once established in its Chicago headquarters in the 1890s, the Sears, Roebuck motto became “I will.”
- At one point, the Sears Wish Book weighed six pounds, had 1500 pages, listed a hundred thousand items, and reached some twenty million Americans.

- As an indicator of Sears' marketing genius, he made his catalog just a bit smaller than the Ward catalog so people would stack the Sears book on top as both lay on parlor tables in homes all over America.

### MVE Arguments

Make your case using this and other data.

- First, you must consider the importance of the mass marketer as you sort out valuable entrepreneurs. I was the supreme mass marketer of my era. I made it possible for people—common people—to buy whatever they wanted, wherever they lived. I targeted rural Americans who were generally isolated from large city merchants. My mail-order catalogs and simple ordering process made their dreams come true. Not for nothing, my catalog became the “Wish Book” and was revered and placed alongside the Bible in most homes.
- Second, my life—as short as it turned out to be—is the perfect success story. I know the others on the panel have similar tales of rags-to-riches careers. Like most of them, I started out with virtually nothing. Within less than ten years, I had reached the top. I invested \$50 in unwanted pocket watches. When I retired in 1908, my net worth was about \$17 million. I worked hard in those years. I made every effort to know and then satisfy my people: good, decent midwestern folks who wanted to enrich their existence. I earned their trust and it paid off handsomely. Their patronage made me a success.
- Third, I was an honest businessman, if not at first. How many on the panel can make that claim? My early catalog ads were, at times, deceptive and misleading if not exaggerated or false. A truth-in-advertising policy just didn't exist in the late nineteenth century. An attitude of “buyer beware” prevailed in retailing. Further, businessmen of the time operated mostly without any government regulation, unlike today. Eventually, I came to realize that honesty does indeed pay! My customers deserved better, especially in advertising. To me, the customer has dignity and “is always right.” So I decided to sell higher-quality items in more accurate ads. Thankfully, other retailers followed my example. Can the oilman, the railroad magnate, the Steel King, the Wall Street Banker, or “lightbulb Tom” here brag about their honesty or integrity?
- Fourth, I started my entrepreneurial journey in 1886. My mail-order business peaked in the 1890s and early decades of the twentieth century. But Sears, Roebuck is still around! My department stores are everywhere in American towns and cities. My catalog sales bring in millions. My company became an American institution, a familiar and revered icon. I made this happen. “Sears—where America still shops!” Are the companies of my fellow panelists still thriving into the twenty-first century? Not like mine.
- Fifth, my efforts have enriched the lives of Americans for over 125 years. My marketing savvy allowed rural Americans and city folks alike to buy, wear, or use my catalog products. As a result, life was better. I played the most important role as the United States grew and matured into a great and democratic country in the Industrial Era. I provided my countrymen and women with items that promoted better hygiene and health, eased their work burdens,

and sometimes entertained them with parlor gadgets like phonographs. In a large sense, I granted wishes.

Mr. Sears fulfilled your dreams,  
Sending you shotguns and anti-freckle creams.  
So honor me, make my day.  
I'm MVE of the USA!

### Questions You Must Answer

1. Richard Warren Sears. "Sears, where American shops!" That's you, is it? So how did it all start? There's a story about selling gold pocket watches to other railroad agents. Share with us this tale of how you seized your first business opportunity.
2. For years, your catalog was always anticipated by, and had a great impact on, Americans during the Industrial Era. Just how great was your catalog's impact?
3. What motivated you to get into the mail-order market and what did you see in rural, midwestern America that led you to be a marketer for this section of the country? Didn't Montgomery Ward dominate mail-order sales?
4. What personal traits did you have that made you an admired entrepreneur of a successful Chicago-based mail-order business?
5. So Mr. Sears, here's another opportunity for you to compete and emerge a winner. Tell us why you deserve to be the MVE of the Industrial Age over the others on this panel. State your case now.

### Costume/Flourishes

Richard Sears looked like a typical businessman of his day. With this in mind, dress well in a three-piece suit. Be well groomed and sport a thick, but not drooping, dark mustache. As a flourish, pull out a pocket watch as you tell the story requested in question #1. Perhaps one of your early turn-of-the-century catalogs would provide a nice visual for the audience and panel rivals.

# Summary Statements

**Directions:** Form a large circle (or long line in front of the class) and dramatically read the one summary statement assigned to you. Taken together, these statements properly sum up this activity's content and significance.

1. The era from 1865 to 1910 has many names, including the Industrial Age, Rise of Big Business, and Industrial America.
2. These years were characterized by unparalleled economic growth, aided by abundant natural resources, new machines, plenty of workers, and energetic "go-getters."
3. The Civil War was the launchpad for America's Industrial Revolution, especially in the North, where rifles, uniforms, and artillery were mass-produced.
4. Paralleling the Industrial Age was a new wave of immigrants and the growth of major cities, where most of the newcomers settled.
5. The growth and spread of railroads in this era helped transform America from a rural to an urban nation.
6. This era's industrial entrepreneurs have been called "robber barons" by some because they used questionable and unethical, if not illegal for that time, business practices.
7. These entrepreneurs became famous and iconic in their fields: Carnegie—steel, Rockefeller—oil, Morgan—finance and banking, Edison—technology, and Sears—mass marketing.
8. During this time, Orville and Wilbur Wright launched America into the air age and Alexander Graham Bell invented the telephone.
9. Mark Twain called this era the Gilded Age because it had its share of political graft and corruption, slippery schemes, greed and false glitter—as if painted with a thin layer of gold; artificial and fake.
10. This era experienced an erosion of natural resources and a widening gap between the rich and poor.
11. Because of the Industrial Age's excesses and negative outcomes, the era was followed by an age of reform—the Progressive Era.
12. Today's Rockefellers, Carnegies, and Morgans might be Bill Gates, the late Steve Jobs, Mark Zuckerberg, and Warren Buffett.
13. Entrepreneurs then and now can be defined as people who organize and manage a business or commercial undertaking, often taking investment risks and accepting responsibility for successes and failures.
14. The Industrial Age was advanced by a plethora of inventions, among them the telephone, the phonograph, the electric lightbulb, the automobile, the sewing machine, elevators, streetcars, and refrigeration.
15. The number of millionaires in America grew and some of them became, by virtue of their business success, the richest and most powerful men in the country, if not the world.

# ★ MVE Ballot

Place an X in the box to indicate the Industrial Age entrepreneur you think deserves the honor of MVE. Briefly defend your choice.

**CORNELIUS VANDERBILT**  
(Shipping/Railroads)

**JOHN D. ROCKEFELLER**  
(Oil)

**ANDREW CARNEGIE**  
(Steel)

**J. P. MORGAN**  
(Banking/Finance)

**THOMAS EDISON**  
(Invention)

**RICHARD SEARS**  
(Mass-Market Retail)

I chose \_\_\_\_\_  
as MVE because: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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(Mass-Market Retail)

I chose \_\_\_\_\_  
as MVE because: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# Entrepreneur—Are You One?

Many people believe that the six American businessmen in this activity personify the word “entrepreneur,” defined as “a person who organizes and manages, often with some risk, a commercial undertaking.” These six men invested in and presided over the new world of “throbbing machines, noisy factories and crowded cities.” Motivated by profit—some critics would say greed—each of these famous entrepreneurs seized seemingly unlimited opportunities that emerged in the post–Civil War era, an era that admired successful, wealthy people as heroes. “It is your duty to get rich,” said one minister at that time.

While perhaps diverse in personality in small measures, the six shared at least one trait: self-reliant individualism—going their own way, devising clever strategies and applying nonstop work habits to achieve goals. These men were giants in their respective fields: shipping and railroads, oil, steel, finance, inventions, and catalog marketing. Each attributed their success to possessing typical traits of entrepreneurs then and now. Are you destined to be the next J. P., J. D., Andy, Tom, Cornelius, or Richard?

Check off the traits you think you possess:

- \_\_\_\_\_ 1. I’m self-motivated and ambitious.
- \_\_\_\_\_ 2. I’m a leader of others and I take charge of situations.
- \_\_\_\_\_ 3. I persevere and don’t quit.
- \_\_\_\_\_ 4. I plan ahead and have goals.
- \_\_\_\_\_ 5. I’m a really hard worker.
- \_\_\_\_\_ 6. I make my own decisions and accept responsibility for mistakes.
- \_\_\_\_\_ 7. I will love what I do in the business field.
- \_\_\_\_\_ 8. I am willing to take calculated risks.
- \_\_\_\_\_ 9. I want to be wealthy.

Some—maybe all—of the six had more than one trait that most entrepreneurs don’t have today. In their era, they often broke or bent rules and laws, part of the mindset in the culture of 1865 to 1910. There were few, if any, government regulations and there was no federal income tax to limit profits. Still, they achieved their goals and so can you . . . within the law.

# Postscript

## The Response to Industrialism

The efforts and impact of the six titans of the Industrial Age—visionary entrepreneurs to the core—propelled the United States into and through the late nineteenth century and early years of the twentieth century. As they did, Vanderbilt, Carnegie, Rockefeller, Morgan, Edison, and Sears became symbols of American business culture and success throughout the world. In the years since then, they still personify and define the so-called Gilded Age in both positive and negative ways.

Each, in his own way, advanced modern successful business models, hired thousands of workers, developed new technologies, stimulated inventions, and established new, efficient managerial techniques. As a result, the United States “leapfrogged past Britain and France in productivity, profitability, and innovation.” A wave of reactions and responses to their self-serving philosophies and ethics was unleashed. These responses to entrepreneurial success and industrialism led to the growth of labor unions to battle perceived and glaring injustices and worker abuses, led to a plethora of legislative reforms, and led to attacks from a vocal cadre of journalists labeled muckrakers—all factors that intended to bring balance to the new economy’s human equation. These movements would also prevent the rich from getting richer at others’ expense. Most of those not on the social register with John D., J. P., or the Vanderbilts felt exploited by the businesses run by the wealthy few, adversely affecting even those immigrants from Europe seeking to fulfill their dreams in the land of opportunity.

To meet the needs for workers in this booming economy, America in the late nineteenth century witnessed a rise in the birthrate (as high as 25 percent in some years) and new waves of immigrants. Instead of emigrating from England, Ireland, Germany, and the Scandinavian countries, these “new” immigrants came from Italy, Greece, Poland, and Russia. Their languages and different cultures and customs created displays of intolerance and discrimination from “natives” and less recent arrivals. From different countries, they came but they all still sought work; factories near cities of the Industrial Age afforded opportunities in spite of low pay and poor working conditions.

It was because of these factors—low pay, unhealthy/unsafe conditions, and long hours—that the nation experienced a rise in labor unions, first led by the Knights of Labor and later by the American Federation of Labor (AFL). Both organizations, while appealing to different kinds of laborers and utilizing an array of different strategies (including strikes) to win support for their members, worked tirelessly in their own ways to secure shorter hours, better pay, and cleaner, safer conditions in which to work.

As the nation was transformed by machines, as immigrants continued to pour through New York’s “golden door,” and as workers strived for better lives, the United States also witnessed a movement to cities. In fact, urbanization was sped up by industrialization and increased immigration in these years. The lure of jobs made the cities the heart of the new industrial society. By 1890, one in three Americans lived in a city. Most of the working poor were forced to live in downtown tenement apartment buildings, which became symbols for abject poverty, disease, and despair in this era. Some cities, like Chicago, offered settlement houses and social workers (e.g., Jane Addams and Hull House) to improve the lives of the unfortunate.

Over the years since 1900, some of these entrepreneurs and their companies have survived and even prospered, despite decades of government regulation and increased corporate taxes. Even though his oil company was ruled a monopoly in 1911 and broken up by the Supreme Court, Rockefeller's Standard Oil is still, despite mergers and buyouts, a visible reminder of his successful entrepreneurial efforts; Standard, Exxon, Mobil, Conoco, BP, and Chevron gas stations remain fixtures of busy street corners. Likewise, Carnegie's name is still connected to countless colleges and libraries he endowed, if not the steel company he founded. The Morgan-Stanley international investment firm and Sears department stores honor, by mere longevity, their founders as well. Every time we turn a light switch on and off we honor the inventor/entrepreneur Thomas Edison.

In recent years, however, most of the names and faces of corporate America, of course, have changed and the wealth earned by their entrepreneurs theoretically has been tempered by laws and taxes. Today's entrepreneurs have found new fields to display their business skills, but all reflect more modern technology. Chief among these "new" fields are computer and communication companies led by the likes of Apple, Disney, Amazon, Microsoft, and Facebook. The successes and profits from these and other firms made billionaires out of Bill Gates, Steve Jobs, Paul Allen, Warren Buffett, Mark Zuckerberg, and Jeff Bezos. They are the Rockefellers, Morgans, Carnegies, and Searses of our day.

One such billionaire-entrepreneur, Donald Trump, who made his fortune in real estate (hotels, casinos, golf courses), parlayed his celebrity as a TV reality show host into a surprising and successful campaign for the U.S. presidency in 2016.

Today we live in a postindustrial society, where the so-called service sector is more important than the manufacturing sector. This is a historic change. Most of the products Americans buy are now manufactured and/or assembled overseas or in neighboring countries. Servicing these products (repairing computers, for example, or inventing software for them) or serving people (e.g., teachers, truck drivers, retail clerks, managers) are what most Americans do today. For a century after America became industrialized, the expansion of the economy was a proud and visible accomplishment. It was one of the most dramatic transformations in history. Whether we judge these six original iconic entrepreneurs as industrial statesmen or robber barons, they have earned their MVE honors by setting us on this path.

# Historical Investigation Activity

## *Icons of Industry (1906)*

By Bill Lacey



**Focus Question:** Did Standard Oil titan John D. Rockefeller Sr. deserve to be vilified by muckraking journalist Ida Tarbell?

### **Materials Needed for This Historical Investigation**

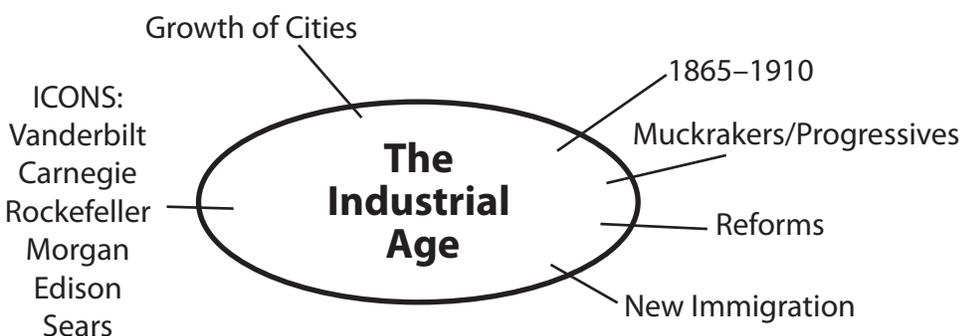
- **Documents A–H**—class set
- **Points to Ponder Response Sheet**—class set

### **Lesson Plan**

#### 1. Getting Started

- Whether you did the Activator Icons of Industry or not, review or find out what students know about this topic—including the era 1865–1910, the entrepreneurs involved, and specifically John D. Rockefeller. Put responses on the board as spokes of a wheel with the circle labeled “The Industrial Age.” The discussion, along with the backstory below, should serve as a solid foundation to use for the analysis of the document package.

#### 2. Backstory to Use as Instruction



- Entrepreneurs in the Industrial Age like Andrew Carnegie (steel), John D. Rockefeller (oil), J. P. Morgan (banking and finance), and, earlier, Cornelius Vanderbilt (shipping and railroads) saw opportunities for great wealth and power and they seized it. Later called “robber barons,” these and other business titans ran legendary companies in a firm and mostly ruthless manner, frequently, it can be argued, destroying competition without regard to fairness, rules, or ethics.
- Because of these questionable tactics and the graft and corruption that at the same time seemed to blight government at every level, this code



of behavior seeped into society as well and threatened to widen the gap between rich and poor and, some would argue, even threatened democracy itself. As a result, the years of the Industrial Age saw the rise of reform movements that led into the Progressive Era (1900–1920).

- In a nutshell, progressives wanted to foster greater democracy, social justice, responsible government, and regulation of big business. They wanted public services for victims of corporate excesses and social and economic inequities.
- As spokespersons for the progressive agenda, there appeared in the years around 1900 a cadre of spirited and powerful writers and journalists labeled “muckrakers,” predecessors of today’s investigative reporters. President Theodore Roosevelt originated the term, saying that these writers were raking the muck of society’s ills and never looked up to see the positives of life. Roosevelt’s moniker stuck and the proud muckrakers flourished over the years. Their exposés helped make some real and enduring changes in American society.
- Writing for popular magazines of the day, like *McClure’s*, *Collier’s*, and *American Magazine*, muckrakers often turned their articles into books, and their impact on the public brought fame and sometimes fortune to several, including Lincoln Steffens, Ray Stannard Baker, Henry Demarest Lloyd, Upton Sinclair, David Graham Phillips, and, especially, Ida Tarbell for her two-volume exposé, *The History of the Standard Oil Company*.
- Like other muckrakers, Ida Tarbell was appalled at the excesses and business practices of the power-elite entrepreneurs in America. Corporate America, she believed, ruled the country, mostly free from regulation or monitoring. It seemed that everyone was at the mercy of these vicious and selfish capitalists. For Tarbell, one name and one company stood out as a prime example of corporate excess and power—Rockefeller and his Standard Oil Company.
- Rockefeller made his millions as a pioneer in oil refining, at a time when crude oil was just beginning to be used as a lubricant and as a fuel (kerosene for lamp illumination). Soon, the automobile would need gasoline, an oil product. Starting in Cleveland, Ohio, and then sending out “tentacles” (it was metaphorically called “The Octopus” for a reason), his company spread to other states.
- Bringing down Standard Oil was not an easy task in the early 1900s. Rockefeller and his fellow entrepreneurs were idolized by many as heroes and role models. Whatever motivated Ida Tarbell (her father and older brother, both oilmen at one point, fell under the Rockefeller steamroller), she used a pen and not a sword to go after Rockefeller, painstakingly interviewing, researching, writing, and finally publishing a series of twenty articles in muckraking magazine *McClure’s* from



November 1902 to October 1904. These articles later became the basis for her famous book.

- By any measure, Tarbell was a passionate, determined crusader. Was she successful in her goal of tarnishing Rockefeller's reputation and putting an end to his obscene profits and lack of business ethics? Did she tell the truth, enough to convince contemporary Americans, the courts, and future historians to view the oilman differently, despite his generous philanthropy? More importantly, did Rockefeller and Standard Oil really deserve to be vilified or demonized by Ida Tarbell?
3. Ask students, "From this backstory, in your opinion, before we look at the documents, do writers like Tarbell have a right and responsibility to research, write, and publish articles and books whenever they see abuse, inequity, and wrongdoing, especially in the affairs of business and government leaders? How important is a free press to foster this right and responsibility?"
  4. Pass out the **Points to Ponder Response Sheet** and have students write their answers to question #1. Allow five to seven minutes before you discuss their responses. Perhaps you could take a poll by a showing of hands to give you a working hypothesis.
  5. Say, "Our working hypothesis seems to be . . ."
  6. Pass out the package of **Documents A–H** and explain what students are to do.
  7. Allow forty-five minutes for students (in pairs or trios) to read and analyze the document package. Perhaps you (or a student) should read aloud the first one or two documents and help students fill in the appropriate spaces on the **Points to Ponder Response Sheet**. Tell students that the documents are in a logical sequence. Also remind students that they should analyze the documents carefully.
  8. After their work, discuss with students and have several of them read their answers to the **Focus Question**.

Name \_\_\_\_\_ Date: \_\_\_\_\_

# Points to Ponder Response Sheet

**Focus Question:** Did Standard Oil titan John D. Rockefeller Sr. deserve to be vilified by muckraking journalist Ida Tarbell?

- 1. Do writers like Ida Tarbell have a right and responsibility to research, write, and publish articles and books whenever they see abuse, inequity, wrongdoing, and misbehavior, especially in the affairs of business leaders and government officials? How important is a free press to foster this right and responsibility?

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- 2. **Document A:** Joseph Pulitzer, if truth be told, made his fame and fortune publishing sensationalized and often exaggerated news when, as an owner of a New York newspaper, he was locked in a circulation war with William Randolph Hearst, of yellow journalism fame. Does this fact take away from his credibility? Who is he writing for in this excerpt?

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- 3. **Document B:** Of all the misdeeds Tarbell finds Rockefeller to be guilty of, which is the most egregious (especially bad)? Explain why.

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Tarbell wrote for a muckraking magazine (*McClure's*) which, as a business, strives for more subscribers. Could this fact lead Tarbell to exaggerate, attack, or use rumors to support her claims? Explain.

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In Excerpt 4, Tarbell writes about how too many believe Rockefeller's practices are "just business," as if his behavior is acceptable. Summarize her views on this point in two or three sentences.

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4. **Document C:** List three main points Rockefeller uses to justify his receiving rebates from railroad companies.

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Rockefeller (or a ghostwriter) wrote his autobiography in 1909. This was about five years after Tarbell's articles appeared in *McClure's* and two years before the Supreme Court ruled on the methods Standard Oil used to conduct business. How different would it be today if Rockefeller chose to refute a muckraker's reputation-ruining attack?

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5. **Document D:** What specifically did Rockefeller do to Rice's company that would put Rice, and others like him, out of business?

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When and where did Rice choose to reveal his "ruinous experience?" What do you think his motives were?

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6. **Document E:** Fill in this chart, using points Nevins makes, to give a balanced interpretation of Rockefeller/Standard Oil.

Credit (positive)	Debit (negative)
•	•
•	•

7. **Document F:** Does the fact that both historians claim to be “patriots” and view U.S. history in a conservative and positive light take away from their interpretation of Rockefeller? How do they justify rebating?

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In their point of view, who would eventually benefit from rebating? Why?

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8. **Document G:** Rockefeller broke his silence over a decade after Tarbell’s attack on him. In two sentences, sum up what he says about her:

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What seems to anger him the most? Why?

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Why would Rockefeller choose to be interviewed after years of silence?

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9. **Document H:** What kind of document is this?

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(Excerpt 1): Who wrote this and when?

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What does this ruling actually say?

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(Excerpt 2): According to this source, what impact did the ruling have on:

Standard Oil? \_\_\_\_\_

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Rockefeller himself? \_\_\_\_\_

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# Document A

## The Need for a Free and Aggressive Press

Many believe that a thriving democracy requires a free and open press, skeptical journalists, an outraged reading public, responsible politicians, and publishers willing to provide a soapbox for ideas. Publisher Joseph Pulitzer, known best for the literary prizes named for him, makes a case below for a free, open, and aggressive press, something Ida Tarbell could appreciate.

*We are a democracy, and there is only one way to get a democracy on its feet in the matter of its individual, its social, its municipal, its State, its National conduct, and that is by keeping the public informed about what is going on. There is not a crime, there is not a dodge, there is not a trick, there is not a swindle, there is not a vice which does not live by secrecy. Get these things out in the open, describe them, attack them, ridicule them in the press, and sooner or later public opinion will sweep them away.*

Source: Joseph Pulitzer, as quoted in Alleyne Ireland, *Joseph Pulitzer: Reminiscences of a Secretary* (New York: Mitchell Kennerley, 1914).

# Document B

## Ida Tarbell's Own Words

Though she praised Rockefeller for his company's efficiency and organizational skills, Tarbell's exposé focused mostly on criticizing the firm's business methods and on Rockefeller himself.

### Excerpt 1

*He secured an alliance with the railroads to drive out rivals. For fifteen years he received rebates of varying amounts on at least the greater part of his shipments, and for at least a portion of that time he collected drawbacks of the oil other people shipped; at the same time he worked with the railroads to prevent other people getting oil to manufacture, or if they got it he worked with the railroads to prevent the shipment of the product. If it reached a dealer, he did his utmost to bully or wheedle him to countermand his order. If he failed in that, he undersold until the dealer, losing on his purchase, was glad enough to buy thereafter of Mr. Rockefeller. How much of this system remains in force to-day? The spying on independent shipments, the effort to have orders countermanded, the predatory competition prevailing, are well enough known.*

### Excerpt 2

*There is no independent refiner or jobber who tries to ship oil freight that does not meet incessant discouragement and discrimination. Not only are rates made to favour the Standard refining points and to protect their markets, but switching charges and dock charges are multiplied. Loading and unloading facilities are refused, payment of freights on small quantities [is] demanded in advance, a score of different ways are found to make hard the way of the outsider. "If I get a barrel of oil out of Buffalo," an independent dealer told the writer not long ago, "I have to *sneak* it out. There are no public docks; the railroads control most of them, and they won't let me out if they can help it. If I want to ship a car-load they won't take it if they can help it. They are all afraid of offending the Standard Oil Company."*

### Excerpt 3

*Every great campaign against rival interests which the Standard Oil Company has carried on has been inaugurated, not to save its life, but to build up and sustain a monopoly in the oil industry. These are not mere affirmations of a hostile critic; they are facts proved by documents and figures.*

## Excerpt 4

Very often people who admit the facts, who are willing to see that Mr. Rockefeller has employed force and fraud to secure his ends, justify him by declaring, "It's business." That is, "it's business" has to come to be a legitimate excuse for hard dealing, sly tricks, special privileges. It is a common enough thing to hear men arguing that the ordinary laws of morality do not apply in business. Now, if the Standard Oil Company were the only concern in the country guilty of the practices which have given it monopolistic power, this story never would have been written. Were it alone in these methods, public scorn would long ago have made short work of the Standard Oil Company. But it is simply the most conspicuous type of what can be done by these practices. The methods it employs with such acumen, persistency, and secrecy are employed by all sorts of business men, from corner grocers up to bankers. If exposed, they are excused on the ground that this is business. If the point is pushed, frequently the defender of the practice falls back on the Christian doctrine of charity, and points that we are erring mortals and must allow for each other's weaknesses!—an excuse which, if carried to its legitimate conclusion, would leave our business men weeping on one another's shoulders over human frailty, while they picked one another's pockets.

One of the most depressing features of the ethical side of the matter is that instead of such methods arousing contempt they are more or less openly admired. And this is logical. Canonise\* "business success," and men who make a success like that of the Standard Oil Trust become national heroes! The history of its organization is studied as a practical lesson in money-making.

Source: Ida M. Tarbell, *The History of the Standard Oil Company* (New York: McClure, Phillips & Co., 1904).

\*Canonise—to attribute authoritative sanction or approval to

# Document C

## Rockefeller Justifies His Rebating Policy (1909)

In this passage from his autobiography, John D. Rockefeller defends and justifies receiving rebates from railroad companies with which he contracted to ship his oil. He neglects to mention that, as evidence suggests, his company also forced railroads to make secret payments, called drawbacks, to him on shipments made by his competitors. Railroad rebates were later banned by the Interstate Commerce Act (1887).

Of all the subjects which seem to have attracted the attention of the public to the affairs of the Standard Oil Company, the matter of rebates from railroads has perhaps been uppermost. The Standard Oil Company of Ohio, of which I was president, did receive rebates from the railroads prior to 1880, but received no advantages for which it did not give full compensation. The reason for rebates was that such was the railroads' method of business. A public rate was made and collected by the railroad companies, but, so far as my knowledge extends, was seldom retained in full; a portion of it was repaid to the shippers as a rebate. By this method the real rate of freight which any shipper paid was not known by his competitors nor by other railroad companies, the amount being a matter of bargain with the carrying company. Each shipper made the best bargain that he could, but whether he was doing better than his competitor was only a matter of conjecture. Much depended upon whether the shipper had the advantage of competition of carriers.

. . . The Standard gave advantages to the railroads for the purpose of reducing the cost of transportation of freight. It offered freights in large quantity, car-loads and train-loads. It furnished loading facilities and discharging facilities at great cost. It provided regular traffic, so that a railroad could conduct its transportation to the best advantage and use its equipment to the full extent of its hauling capacity without waiting for the refiner's convenience. It exempted railroads from liability for fire and carried its own insurance. It provided at its own expense terminal facilities which permitted economies in handling. For these services it obtained contracts for special allowances on freights.

But notwithstanding these special allowances, this traffic from the Standard Oil Company was far more profitable to the railroad companies than the smaller and irregular traffic, which might have paid a higher rate.

To understand the situation which affected the giving and taking of rebates it must be remembered that the railroads were all eager to enlarge their freight traffic. They were competing with the facilities and rates offered by the boats on lake and canal and by the pipe-lines. All these means of transporting oil cut into the business of the railroads, and they were desperately anxious to successfully meet this competition. . . .

The profits of the Standard Oil Company did not come from advantages given by railroads. The railroads, rather, were the ones who profited by the traffic of the Standard Oil Company, and whatever advantage it received in its constant efforts to reduce rates of freight was only one of the many elements of lessening cost to the consumer which enabled us to increase our volume of business the world over because we could reduce the selling price.

Source: John D. Rockefeller, *Random Reminiscences of Men and Events* (New York: Doubleday, Page & Company, 1908).

# Document D

## A Standard Oil Competitor Endures but Despairs

George Rice, a Rockefeller competitor, entered the oil-refining business with optimism and hopes of doing business, even with the era's existing low ethical standards, in an atmosphere of fair play.

*I am a citizen of the United States, born in the State of Vermont. Producer of petroleum for more than 30 years, and a refiner of same for 20 years, but my refinery has been shut down during the past 3 years, owing to the powerful and all-prevailing machinations of the Standard Oil Trust, in criminal collusion and conspiracy with the railroads to destroy my business of 20 years of patient industry, toil, and money in building up, wholly by and through unlawful freight discriminations. I have been driven from pillar to post, from one railway line to another, for 20 years, in the absolutely vain endeavor to get equal and just freight rates with the Standard Oil Trust, so as to be able to run my refinery at anything approaching a profit, but which I have been utterly unable to do. I have had to consequently shut down, with my business absolutely ruined and my refinery idle. This has been a very sad, bitter, and ruinous experience for me to endure, but I have endeavored to the best of my circumstances and ability to combat it the utmost I could for many a long waiting year, expecting relief through the honest and proper execution of our laws, which have as yet, however, never come. But I am still living in hopes, though I may die in despair. . . .*

*Outside of rebates or freight discriminations I had no show with the Standard Oil Trust, because of their unlawfully acquired monopoly, by which they could temporarily cut only my customers' prices, and below cost, leaving the balance of the town, nine-tenths, uncut. This they can easily do without any appreciable harm to their general trade, and thus effectually wipe out all competition, as fully set forth. Standard Oil prices generally were so high that I could sell my goods 2 to 3 cents a gallon below their prices and make a nice profit, but these savage attacks and cuts upon my customers' goods . . . plainly showed to them their power for evil, and the uselessness to contend against such odds.*

*Source: Industrial Commission: Preliminary Report on Trusts and Industrial Combinations, Together with Testimony, Review of Evidence, Charts Showing Effects of Prices, and Topical Digest, Volume 1 (Washington, D.C.: Government Printing Office, 1900).*

# Document E

## A Balanced View of JDR?

Distinguished historian Allan Nevins attempts a balanced assessment of Rockefeller and his career, giving criticism and praise in equal measures.

*That the debit side of the ledger has a heavy account is undeniable. The combination of which Rockefeller was captain was one of the most hard-hitting entities in a hard-hitting business world. Its methods were often as questionable as its central aim of monopoly. It made small competitors, as we have noted, "sick," it forced them to "sweat," it stifled them without compunction. It used, like nearly every other concern that could do so, the rebate. For a time it took not merely rebates but a drawback payment secretly exacted from competitors by the railroads, as cruel a device as business history records. Though the period in which this drawback was pocketed was short, it left an ineffaceable stain on the history of the Trust. Like various competitors in the oil business, but more systematically and effectively, the Standard resorted to espionage. With a duplicity that all must find repugnant, it sometimes employed dummy companies. It often "cut to kill," as Miss Tarbell wrote, reducing prices in a given locality until competition was destroyed, and then restoring high charges. That it drew excessive profits from the oil consumers is proved by the size of the fortunes which its heads accumulated. All this, and the long battle with state and Federal opponents of monopoly, entailed forty years of obloquy\* most of it visited on Rockefeller's head. . . .*

*We may well decide, in our final view, that the extremes of praise and blame heaped upon Rockefeller were both unwarranted. His enemies during his years of power abused him as one of the arch-criminals of the age; his admirers during his later years of philanthropy lauded him as one of the world's chief benefactors. Neither estimate possessed historical truth. We may well decide also that, viewed critically, he was not a very attractive personage. Much as his intimates admired him, to the world at large he seemed—and seems—deficient in humanly likable qualities. But that he was one of the most powerful leaders of his time there can be no doubt. Innovator, thinker, planner, bold entrepreneur, he was above all an organizer—one of the master organizers of the era. Taking the most confused, muddled, and anarchic of American industries, he organized it with a completeness, efficiency, and constructive talent that amazed beholders and affected all business activities. Turning to the vague field of philanthropy, he organized a series of undertakings that became models for all givers who followed him. By virtue of this organizing power, backed by keenness of mind, tenacity of purpose, and firmness of character, he looms up as one of the most impressive figures of the century which his lifetime spanned.*

Source: Allan Nevins, *Study in Power: John D. Rockefeller, Industrialist and Philanthropist, Volume II* (New York: Charles Scribner's Sons, 1953).

\*obloquy—criticism

# Document F

## “Patriot” Historians Defend Rebating

Historians Larry Schweikart and Michael Allen wrote their college textbook to “deepen patriotism.” They also wanted it to be stories of “obstacles overcome, passion-invested and blood and tears spilled,” as well as to show the nation’s flaws and shortcomings. They defended Rockefeller’s business practice of rebating.

*By the 1880s, Standard controlled 80 percent of the kerosene market. Since Standard shipped far more oil than anyone else, the company obtained discounts from railroads known as rebates. It is common practice in small businesses today for a frequent customer, after so many purchases, to receive a free item or a discount. Yet in the 1800s, the rebate became the symbol of unfairness and monopoly control. Most, if not all, of the complaints came from competitors unable to meet Rockefeller’s efficiencies—with or without the rebates—never from consumers, whose costs plunged. When Standard obtained 90 percent of the market, kerosene prices had fallen from twenty-six cents to eight cents a gallon. By 1897, at the pinnacle of Standard’s control, prices for refined oil reached “their lowest levels in the history of the petroleum industry.” Most customers of energy—then and now—would beg for control of that nature.*

*Yet Rockefeller was under no illusions that he could eliminate competition: “Competitors we must have, we must have,” he said. “If we absorb them, be sure it will bring up another.” Citing predatory price cutting as a tool to drive out competitors, Rockefeller’s critics, such as Ida Tarbell, bemoaned Standard Oil’s efficiency.*

Source: Larry Schweikart and Michael Allen, *A Patriot’s History of the United States: From Columbus’s Great Discovery to the War on Terror* (New York: Sentinel, 2004).

# Document G

## Rockefeller's Reaction to Tarbell's Exposé

It was Rockefeller's decision to remain mostly silent about Tarbell's scathing work. Nevertheless, he did make a few comments in private and probably directed his company's overall muted reactions to Tarbell's accusations. In a rare interview with journalist William O. Inglis, Rockefeller reacts to a Tarbell accusation that he, in 1872, took over the Cleveland oil refineries by threatening to crush rivals who chose not to join his firm.

*That is absolutely false! This is absolutely false and no man was told that by me or by any of our representatives. You may put that down once and for all. That statement is an absolute lie! . . . How ridiculous all that talk is! It's twaddle, poisonous twaddle, put out for a purpose. . . . Tarbell is much more dangerous [than critic Henry Demarest Lloyd]. She makes a pretence of fairness . . . and beneath that pretence she slips into her 'history' all sorts of evil and prejudicial stuff. . . . [S]he distorts facts, states as facts what she must know is untrue, and utterly disregards reason.*

Source: Ron Chernow, *Titan: The Life of John D. Rockefeller, Sr.* (New York: Vintage, 1998).

# Document H

## The U.S. Supreme Court Rules on Standard Oil (1911)

Some believe that the Tarbell exposé on Standard Oil led to its prosecution in the courts and eventually led to a Supreme Court ruling in 1911 (*Standard Oil of New Jersey v. United States*). The first excerpt is from the Court's majority opinion.

### Excerpt 1

[Chief Justice Edward White, writing for the court:] We think no disinterested mind can survey the period in question without being inevitably driven to the conclusion that the very genius for commercial development and organization, which it would seem was manifested from the beginning, soon begat an interest and purpose to exclude others. [The desire to dominate the industry] was frequently manifested by actions and dealings wholly inconsistent with the theory that they were made with the single conception of advancing the development of business power by usual methods, but which, on the contrary, necessarily involved the intent to drive others from the field and exclude them from their right to trade and thus accomplish the mastery which was the end in view.

### Excerpt 2

. . . [N]either Rockefeller nor other Standard Oil executives suffered meaningful punishment for their decades of evasion. The Supreme Court decision actually multiplied Rockefeller's wealth. Because he held approximately 25 percent of Standard Oil stock before the atomization of the corporate structure, he received that percentage of stock in Standard Oil of New Jersey in addition to cash from each of the thirty-three spinoffs formed in response to the Supreme Court mandate. Anticipating a boom in automotive travel, investors eagerly bought into the new companies. As the stock prices rose, Rockefeller's net worth tripled, then quintupled, making him almost certainly the first billionaire in America's existence.

Source: Both excerpts are from Steve Weinberg, *Taking on the Trust: How Ida Tarbell Brought Down John D. Rockefeller and Standard Oil* (New York: W. W. Norton, 2008).

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