

AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge
25 Newton Road, Woodbridge, Connecticut 06525

Dr. Jennifer P. Byars
Superintendent of Schools

AMITY REGIONAL BOARD OF EDUCATION REGULAR MEETING AGENDA

Monday, February 10, 2025 6:30 pm
25 Newton Road, Woodbridge, CT
Lecture Hall

1. **CALL TO ORDER**
2. **PLEDGE OF ALLEGIANCE**
3. **APPROVAL OF MINUTES**
 - a. Board of Education Special Meeting – January 27, 2025 [page 4](#)
4. **PRESENTATION ON SOLAR CANOPY OPTION FOR AMITY REGIONAL HIGH SCHOOL – TITAN ENERGY**
 - a. Discussion and Possible Action on Approval authorizing the Superintendent to enter into a solar power purchase agreement and the installation of a solar canopy at Amity Regional High School. [page 6](#)
5. **PUBLIC COMMENT**
6. **CORRESPONDENCE**
7. **PRESENTATION AND DISCUSSION OF THE SUPERINTENDENT’S PROPOSED 2025-2026 BUDGET** [page 7](#)
8. **DISCUSSION AND POSSIBLE ACTION ON CHANGES TO THE 2024-2025 SCHOOL CALENDAR** [page 8](#)
9. **CHAIRMAN’S REPORT**
 - a. Committee Reports
 1. **ACES**
 2. **CABE**
 3. **Communications**
 4. **Curriculum**
 - a. Discussion and Possible Action on New High School Course Additions [page 9](#)
 - b. Discussion and Possible Action on Adoption of Revised Curricula
 - i. English Grade 9 [page 10](#)
 - ii. English Grade 10 [page 50](#)
 - iii. English Grade 11 [page 101](#)
 - iv. AP US History [page 158](#)
 - v. ECE Chinese [page 311](#)
 5. **District Health and Safety**
 6. **Diversity, Equity, and Inclusion Executive Committee**
 7. **District Technology**
 - a. Monthly Report [page 396](#)
 8. **Facilities**

PLEASE POST

PLEASE POST

- a. Monthly Report [page 397](#)

6. **Finance**

- a. Presentation and Discussion of Fourth Quarter 2024 Executive Summary Review of Amity Pension Fund, Sick and Severance Account, and OPEB Trust [page 398](#)
- b. Discussion and Possible Action on Designating Final Reimbursement for HVAC Grant [page 428](#)
- c. Discussion of Monthly Financial Statements [page 429](#)
- d. Director of Finance and Administration Approved Transfers Under \$3,000 [page 458](#)
- e. Discussion and Possible Action on Accepting a Gift [page 459](#)

7. **Policy**

a. **First Reads**

- i. Policy 5144.4 - Physical Exercise and Discipline of Students [page 460](#)
- ii. Policy 5145.111 - Students/Probation/Police/Courts [page 462](#)

b. **Second Reads**

- i. Policy 5141.231 - Psychotropic Drugs [page 464](#)
- ii. Policy 5142.4 - School Resource Officer [page 466](#)

8. **Personnel**

- a. Personnel Report [page 469](#)

10. **NEW BUSINESS & ANNOUNCEMENTS**

- a. Special Joint AFC and Amity BOE Meeting February 24, 2025
- b. Executive Session February 24, 2025 – Superintendent’s Mid-Year Review

11. **ITEMS FOR THE NEXT REGULAR MEETING AGENDA – Due to Chairperson by February 28, 2025**

12. **ADJOURNMENT**



Jennifer P. Byars, Ed.D.
Superintendent of Schools

pc: Town Clerks Bethany, Orange, Woodbridge

***Working to "enable every Amity student to become a lifelong learner
and a literate, caring, creative and effective world citizen."***
District Mission Statement

If you require accommodations to participate because of a disability,
please contact the office of the Superintendent of Schools in advance at 203-397-4811.

AMITY REGIONAL SCHOOL DISTRICT NO. 5
BOARD OF EDUCATION
Bethany Orange Woodbridge



NORMS

BE RESPECTFUL

- Model civil discourse and discussion, respecting all viewpoints, welcoming ideas, and disagreeing with courtesy.
- Collaborate as a team.
- Listen actively and refrain from interruptions or side conversations.
- Respect each others' time by brevity of comment.
- Be fully present and mindful of the distractions caused by electronic devices.
- Grow and learn from each other.

HONOR THE POSITION

- Work within the Board's statutory and policy duties.
- Prepare for Board & Committee meetings by reading the packet prior to the meeting.
- Treat each student, parent, and stakeholder respectfully and assist them in following the designated chain of command.
- Be reflective, including conducting an annual Board self-evaluation.

REPRESENT THE BOARD WITH UNITY AND PRIDE

- Make decisions based on what is best for the collective student body of Amity Regional School District No. 5.
- Respect the professional expertise of the staff.
- Be flexible in response to challenges.
- Collaboratively engage in discussions and actions and once voted on, provide undivided support of Board decisions in both public and private.

AMITY REGIONAL BOARD OF EDUCATION SPECIAL MEETING MINUTES

Monday, January 27 2025, 6:30 pm

25 Newton Road, Woodbridge, CT

Lecture Hall

BOARD MEMBERS PRESENT

Cathy Bradley, Paul Davis, Carla Eichler, Sean Hartshorn, Dr. Karunakaran, Christina Levere-D’Addio, Michael McDonough* arrived at 6:36 p.m., Patrick Reed, Donna Schlank

BOARD MEMBERS ABSENT

Andrea Hubbard, Dana Lombardi, Dr. Carol Oladele, Donna Schuster

STUDENT BOARD MEMBERS PRESENT

Sophia Messina and Janet Fan

STAFF MEMBERS PRESENT

Dr. Jennifer Byars, Theresa Lumas, Thomas Brant

1. CALL TO ORDER

Chairperson Davis called the meeting to order at 6:35 p.m.

2. PLEDGE OF ALLEGIANCE

Led by Amity Board of Education Chair Paul Davis

3. APPROVAL OF MINUTES

a. Board of Education Regular Meeting – January 13, 2025

MOTION by Sean Hartshorn SECOND by Patrick Reed to approve January 13, 2025 minutes as submitted.

VOTES IN FAVOR, 8 (UNANIMOUS)

MOTION CARRIES

4. STUDENT REPORT

a. Monthly Report

Presented by Board of Education student representatives Sophia Messina and Janet Fan

Dr. Karunakaran called the Amity Finance Committee meeting back to order at 6:40 p.m. to join the BOE meeting for Dr. Byar’s presentation on the proposed 2025-2026 Budget.

5. UPDATE ON THE SUPERINTENDENT’S PROPOSED 2025-2026 BUDGET

Presented by Amity Region 5 Superintendent of Schools Dr. Jennifer Byars

6. DISCUSSION ON THE SUPERINTENDENT’S PROPOSED 2025-2026 BUDGET

7. RECESS

Dr. Karunakaran adjourned the Amity Finance Committee, without objection, at 7:33 p.m.

BOE took a short recess from 7:33 p.m. - 7:36 p.m.

8. SUPERINTENDENT'S REPORT

a. Superintendent Report

b. Questions on English, Social Studies, or World Language Curriculum Revisions

Presented by Amity Region 5 Superintendent of Schools Dr. Jennifer Byars

9. PUBLIC COMMENT – Public Comment will be limited to those items noticed in this agenda
None

10. ITEMS FOR THE NEXT REGULAR MEETING AGENDA – Due to Chairperson by January 31, 2025

11. ADJOURNMENT

Meeting adjourned, without objection, at 7:57 p.m by Chairperson Davis.

Respectfully submitted,

Lisa Zaleski

Lisa Zaleski

BOE Recording Secretary

AMITY REGIONAL SCHOOL DISTRICT NO. 5
Bethany Orange Woodbridge
25 Newton Road, Woodbridge Connecticut 06525



To: Jennifer P. Byars, Superintendent of Schools

From: Theresa Lumas, Director of Finance & Administration

Date: January 31, 2025

Re: Solar Canopy Plan Recommendation

Titan Energy presented an opportunity to install a solar canopy in the high school parking lot. The project qualifies for funding under the non-Residential Renewable Energy Solutions (NRES) Program. The projected savings are \$80,006 annually for 20 years. The panels have a 25-year warranty. There will be conduit installed for EV charging stations if the District wishes to add later. The Town of Woodbridge has projects at Beecher Road School and the closed landfill that the District's project would be incorporated into that portfolio. Construction would happen in the summer of 2026. There is a March deadline for incentive funding.

The Facilities Committee made a recommendation to the full Board to authorize you to enter into an agreement with Titan Energy and Greenskies Clean Energy LLC.

Suggested motion:

- 1. The Amity Board of Education authorizes the Superintendent to enter into a solar power purchase agreement with Greenskies Clean Energy, LLC and/or Titan Energy to install a solar canopy in the high school parking lot.***

AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge
25 Newton Road, Woodbridge Connecticut 06525



TO: Whom It May Concern
FROM: Theresa Lumas, Director of Finance & Administration
DATE: February 3, 2025
RE: 2025-2026 Budget Update

The proposed budget for the 2025-2026 fiscal year represents a 3.16% increase. This represents a summary of all account increases and decreases. Municipalities and school districts across the State report the year-over-year changes by comparing the proposed budget to the current budget.

There is a current net increase in Average Daily Membership (ADM) of 37 students. Total enrollment increased by 35 students compared to 27 anticipated.

The main factors driving the initial budget requests include salaries, technology, staffing needs, benefits, and inflation-related increases for standard purchases. Contractual salary increases are projected to be an average of 3.86%. The District is in the second year of the teacher contract, and since teachers represent the largest staff group, their 4.5% contractual increase is the primary driver of the salary increase. Technology-related requests include a new lab for tech education, replacing 245 teacher devices, and setting aside approximately \$100,000 for potential infrastructure issues. Benefit costs are expected to increase by 3.84%. Debt service has decreased by \$1,305,915, due to the ongoing reduction of existing debt and the use of the educational expenditure fund for large projects.

The Administration has noted the decline in debt service in both last year and this year's presentation, budget book and budget correspondence with the AFC and BOE. The current budget book portrays the debt decline 15 times (excluding table of contents and headers), 12 of which either numerically or narratively depict the decline. The first instance is on the very first page after the cover, page i, followed by pages 8,9,10,15,18,23,36,37,62,71,74,77,104,and 107.

Estimates for the Special Education Excess Cost grant have been updated based on the most recent information available from the State. The reimbursement rate is budgeted at 60%, which is a historic low with the possibility of the actual reimbursement rate falling further. The current fiscal year revenue is projected to be \$80,355 less than the January forecast, a total of \$206,466 less than anticipated for the current year and \$95,439 less for next year than originally proposed.

Below is a summary of the Town allocations with the proposed budget adjusted for the lower revenue.

	2024-2025	2025-2026	\$ Variance	% Variance
Bethany	\$9,012,104	\$9,181,614	\$169,510	1.88%
Orange	\$27,479,040	\$27,597,822	\$118,782	0.43%
Woodbridge	\$18,780,881	\$20,189,068	\$1,408,187	7.50%
Other Revenue	\$1,184,627	\$1,273,195	\$ 88,568	1.94%
Total	\$56,456,652	\$58,241,699	\$1,785,047	3.16%

AMITY REGIONAL SCHOOL DISTRICT NO. 5
Bethany Orange Woodbridge
25 Newton Road, Woodbridge, Connecticut 06525



Dr. Jennifer P. Byars
Superintendent of Schools

jennifer.byars@amityregion5.org
203.392.2106

To: Amity Board of Education

From: Jennifer Byars, Superintendent

Date: February 10, 2025

Re: Adjustment to the 2024-2025 School Calendar

Due to inclement weather, Amity Regional School District has cancelled two planned early release days; Professional learning for teachers and staff was scheduled for the afternoon of both these days. CT Gen Stat § 10-220a requires Boards of Education to provide professional development opportunities to teachers, administrators and pupil personnel.

We are currently working with outside presenters to identify when most of them can make up the professional learning session. Based on the current school year calendar, we are considering either Thursday March 27, 2025 or Thursday, April 3, 2025 for a early release for students and a make-up professional learning session. We will make this decision once we have heard back from all the outside presenters.

Amity Board of Education:

Move to authorize the Superintendent to change the 2024-2025 school calendar to include one make-up early release professional learning day on either March 27, 2025 or April 3, 2025 and to communicate this as soon as feasible to families and employees.

AMITY REGIONAL SCHOOL DISTRICT NO. 5
Bethany Orange Woodbridge
25 Newton Road, Woodbridge Connecticut 06525



To: Jennifer P. Byars, Superintendent of Schools
From: Shannan Carlson, Assistant Superintendent
Date: February 10, 2025
Re: New Course Additions to the Program of Studies

The Curriculum Council and Amity Regional High School Administration are making a recommendation for two new courses to our Program of Studies. The courses are:

If you Love It, Teach It- Grades 11, 12 (Pending BOE Approval and UConn Approval)
This course may be offered for dual enrollment credit through UConn (EDCI 1100)

This is an educational foundations survey course for those who are interested in learning more about the landscape of K12 education and how to connect their passions to it. If You Love it, Teach It engages students interested in working in K12 settings in studies about teaching, learning, and schooling in the United States. It explores teaching and learning as processes that can relate to personal passions as well as how those passions are shaped, cultivated, or denied in different educational contexts. Course topics will include introductions to historical, philosophical, and social foundations of education, as well as how those foundations and personal passions relate to teaching as a profession, school organization, educational reform, and the reimagining of educational futures.

Introduction to Special Education- Grades 11, 12 (Pending BOE Approval and UConn Approval)
This course may be offered for dual enrollment credit through UConn (EPSY 1100)

This is an introductory course for those interested in the teaching profession and want to learn more about special education. Students will become familiar with the history, laws, regulations and concepts related to exceptional students and special education in American schools. They will gain an understanding of the characteristics of certain exceptionalities and how these characteristics might impact student learning. Students will explore their own attitudes regarding exceptional students and people with disabilities and gain an understanding of the roles of various professionals in working with exceptional students in American schools.

I am requesting the following motion to take action to recommend the Amity Board of Education approve these two new courses.

Amity Curriculum Committee:

Move to recommend the Amity Board of Education approve –

Amity Board of Education:

Move to approve – ... the two new courses to our Program of Studies: If you Love It, Teach It and Introduction to Special Education.

REGION 5 UNIT ORGANIZER

Grade/Subject	Grade 9/English I
Unit Title	What shapes identity?
Overview of Unit	The thematic focus for this unit is on identity and what factors shape one's identity. The skills focus for this unit is that students will determine the theme of various texts and find strong evidence to support the theme. The final performance task will be to write an essay that explains an important theme in a literary text.
Pacing	Beginning of the year: 10 weeks

Background Information For The Teacher (Unit Overview)

Rationale: This is the first unit of the year and sets the foundation for learning for the first semester. We begin with the question "What shapes identity?" for two reasons: so that students can reflect on who they are and what shapes what they think and believe, and to be able to do the same for characters they will encounter in literature. This will also set them up for an ability to consider and understand how other people's perspectives are shaped by their identities, helping to create empathy. By asking students to analyze character choices and points of view, students will be exposed to different perspectives, values, and ways of thinking that will help them to empathize with others.

We also explore strategies for understanding how a theme emerges and develops over the course of a text so that they can explore that in future texts throughout all four years of high school and so they are able to understand the big ideas of any text that they encounter. Theme analysis also helps them to see that stories reflect universal aspects of humanity that tie us together. Finally, learning to use evidence to support their themes will help students to better support any argument in the future.

Key Learning/Big Ideas:

- Read and comprehend complex literary and informational texts independently and proficiently.
- Read closely to determine what the text says explicitly and to make logical inferences from it; cite specific textual evidence when writing or speaking to support conclusions drawn from the text.
- Determine central ideas or themes of a text and analyze their development; summarize the key supporting details and ideas.
- Analyze how and why individuals, events, and ideas develop and interact over the course of a text.

REGION 5 UNIT ORGANIZER

Essential Questions

Essential Questions

- What shapes our identities?
- How do our experiences affect our sense of identity and our progress toward maturity?
- How is identity shaped by both our own perceptions of ourselves as well as the perceptions of others?
- What do we need in order to grow and develop and to deal with difficult circumstances?

Core Content Standards

Content Specific Standards (NGSS, SS Framework, CCS, etc.)

- CCSS.ELA-Literacy.RL.9-10.1. Cite strong and thorough textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.
- RL.9-10.10. By the end of grade 9, read and comprehend literature, including stories, dramas, and poems, in the grades 9–10 text complexity band proficiently, with scaffolding as needed at the high end of the range.
- RL.9-10.2. Determine a theme or central idea of a text and analyze in detail its development over the course of the text, including how it emerges and is shaped and refined by specific details; provide an objective summary of the text.
- RL.9-10.3. Analyze how complex characters (e.g., those with multiple or conflicting motivations) develop over the course of a text, interact with other characters, and advance the plot or develop the theme.
- W.9-10.9. Draw evidence from literary or informational texts to support analysis, reflection, and research.
- W. 9-10.2. Write informative/explanatory texts to examine and convey complex ideas, concepts, and information clearly and accurately through the effective selection, organization, and analysis of content.
- SL.9-10.1 Initiate and participate effectively in a range of collaborative discussions on relevant topics, texts, and issues

REGION 5 UNIT ORGANIZER

Portrait of the Graduate Characteristics	<ul style="list-style-type: none"> ● Collaborator ● Communicator ● Empathizer ● Problem Solver ● Planner
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K-U-D	
UNDERSTANDS	
<p>Students will understand that:</p> <ul style="list-style-type: none"> ● Our identities are shaped by various factors and can change throughout our lives. ● Different strategies and literary devices reveal themes in a text. ● We use evidence to support claims we make in writing to add credibility to our thinking. ● There are expected formats and procedures for formal high school writing. 	
KNOW	DO
<ul style="list-style-type: none"> ● identity ● motif ● internal conflict ● external conflict ● character change (dynamic character) ● resolution ● theme ● MLA format ● embedding quotations 	<ul style="list-style-type: none"> ● use evidence in the form of quotes and phrases ● cite evidence correctly ● identify the theme of a text ● track how a theme develops over the course of a text ● analyze character development throughout a story ● write a comprehensive thematic statement ● find strong evidence to support theme ● engage in collaborative discussions in small groups and with the whole class

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Common Student Misconceptions for this Unit

Students might mistakenly believe that:

- A theme might be a single word.
- A theme is a cliché.
- A theme is a directive (do this or don't do that).
- A theme is an absolute.
- Summary is analysis (i.e. students regurgitate plot and don't analyze).
- Nothing has influenced their personalities or perspectives; their identity just is.

Unit Assessment

Performance Assessment

Task Overview:

Students will be asked to imagine that the Board of Education is questioning the value of reading certain short stories in English, and that they need to explain how the chosen story reflects a universal theme of humanity and is worth reading.

Students will read and annotate a short story and identify a theme. Then, they will write an essay analyzing how the theme emerges and develops throughout the text using specific details from the story as evidence.

Teachers can differentiate by choosing a story appropriate for student reading level, and the length of the essay can be adjusted as well.

Other (Formative, quizzes, tests, etc.)

- Students will watch a few short films and use the motif graphic organizer and conflict/resolution graphic organizer to identify themes using two different strategies. All necessary documents and information can be found on the [theme slideshow](#). This is an ongoing assignment, using the same graphic organizer for each required text.

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Student Directions: (link to Google document that will be given to students)



[Theme Summative Assessment assignment and rubric](#)

Supplemental Materials and Resources

- CommonLit
- TED Talks
- YouTube for Pixar

Texts

Required Texts

Title	Author	Rationale	Lexile Level (where applicable)
 <i>What it's like to ...</i> Questions Transcript	TED.com Dalia Mogahed	This text allows for conversations and teachable moments regarding many of the topics on the essential question: <i>What shapes our identity?</i> This becomes an anchor text when we later discuss issues of “the other,” stereotypes, and rhetorical devices.	NP
 Disney Pixar Piper	Disney Pixar	This movie is short and familiar. It allows students to see various big ideas and apply them to one who is not human, which helps them see the universality of a theme.	NP


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<u>"On the Bridge" by Todd Strasser</u>	Todd Strasser	This anchor text is highly relatable and accessible to all students regardless of ability. There are fairly obvious motifs in the story and clear character change which will help students identify the theme. (Can be used to practice for unit assessment or used as the text for unit assessment, depending on class/level, etc.)	
Suggested Texts			
<i>Novels/Plays</i>			
<u><i>A Midsummer Night's Dream</i> by William Shakespeare</u>	William Shakespeare	A character driven comedy, Shakespeare's <i>A Midsummer Night's Dream</i> develops themes centering on love, friendship, jealousy, and the pursuit of one's dreams.	1080L
<u><i>The Odyssey</i> by Homer</u>	Homer		1130L
<u><i>Night</i> by Elie Wiesel</u>	Elie Wiesel	This historical memoir explores the life of author Elie Wiesel as he struggles to survive internment in the concentration camps of WWII. Wiesel's narrative develops several themes on topics of faith, identity, family, and humanity.	590L
<u><i>Speak</i> by Laurie Halse Anderson</u>	Laurie Halse Anderson	This novel shows how identity is shaped by experiences. It also features a dynamic character who changes significantly over the course of the text and allows the reader to see how a theme develops over the course of the text.	690L
<u><i>A Tale of Two Cities</i> by Charles Dickens</u>	Charles Dickens	Though this is an historical novel, universal themes emerge and students see how outside forces influence the identity of many characters	1130L

REGION 5 UNIT ORGANIZER

		who are both dynamic and static.	
<u><i>The Bean Trees</i> by Barbara Kingsolver</u>	Barbara Kingsolver	Though set in the 1980s, this novel addresses ideas that are significant in present time with characters who are culturally diverse.	900L
<i>Short Stories/Articles/Poems</i>			
<u>"Hello My Name Is" by (personal narrative)</u>	Jason Kim	Shows how identity is sometimes shaped by being excluded from or ridiculed by society.	1060L
<u>"Thank you Ma'am" Langston Hughes</u>	Langston Hughes	This short story is included in CommonLit which includes a lesson on finding evidence to support the theme. This will allow students to practice this skill.	670L
<u>"I'm Nobody! Who are you?" by Emily Dickinson</u>	Emily Dickinson	This is a short poem in first person point of view which shows both an internal and external conflict in which the main character struggles with their identity.	NP
<u>"Why I Learned to Cook"</u>	Sara Farizan	Has a clear character conflict and shows how the character changes over the course of the text to allow for theme analysis. It also includes ethnic and sexuality diversity that meets DEI expectations.	
<u>"The Container We Have Built for You"</u>	Isabel Wilkerson	Discusses how society shapes our identities by trying to force us to conform to certain expectations.	
<u>"Sympathy" by Paul Laurence Dunbar</u>	Paul Laurence Dunbar	This poem helps students answer the essential question: What factors shape our identity? With background knowledge of the author, they will recognize that marginalized people might feel voiceless or "caged." This poem is featured	NP

REGION 5 UNIT ORGANIZER

		in the short story “Sweet, Difficult Sounds” and can be read before that short story if teachers choose to use it for the final assessment.	
<u>“We Wear the Mask”</u> by Paul Laurence Dunbar	Paul Laurence Dunbar	This poem can be paired with “Sympathy” and also answers the essential question: What factors shape our identity? Students will be led to understand that people often hide parts of themselves (or wear a mask) because they do not feel heard or recognized.	NP
<u>“Sweet Difficult Sounds”</u> by I.M. Desta	I.M. Desta	This short story allows for conversations regarding the essential question on identity in Unit 1. Students should recognize that many people feel insecure or voiceless because they are socially isolated. This text	790L
Media (video/image/art)			
 <u>“Because I’m Lat...”</u>	WNYC	This video allows students to continue to answer the question: What factors shape our identity? It features 12 year old students who discuss the issues of race, racism, and stereotypes that they’ve faced and how those prejudices shaped their feelings about themselves.	
<u>Video Activities on What Shapes Our Identity?</u>	multiple authors	These videos allow students to answer the question: What factors shape our identity? It features several students who speak about the issues of stereotypes, race, gender, and religion.	n/a

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Learning Plan	
Required Learning Activities	
<i>In Order to Learn:</i>	<i>Students will:</i>
How our identities are shaped by various factors and can change throughout our lives	<ul style="list-style-type: none"> ● Explore different factors that shape identity by doing a word web/class discussion, etc. to see that numerous factors impact identity. ● Complete the activities in <u>this Identity packet</u>. Use <u>this identity wheel</u> to complete activities.
To identify and analyze themes in a text.	<ul style="list-style-type: none"> ● Understand how motifs can lead to developing a thematic statement. <ul style="list-style-type: none"> ○ watching short films and reading short fiction and noticing ideas that repeat ○ modeling and practicing motif/big idea/theme strategy: <u>Motif graphic organizer</u>, <u>Theme Slideshow</u> ● See how noting how a character changes throughout a story helps to determine a thematic statement: <u>conflict/resolution graphic organizer</u> which includes internal v. external conflict, resolution, and character change. ● Watch Piper (and other short films if time) and complete the organizer for the above strategies together and then individually (I do, we do, you do).
To use evidence to support claims we make in writing.	<ul style="list-style-type: none"> ● Watch Piper, use motif graphic organizers to find evidence to support the theme. <ul style="list-style-type: none"> ○ <u>Motif graphic organizer</u>, <u>conflict/resolution graphic organizer</u> ● Read strong and weak quotations from a story and asked to identify what makes the quotations effective in identifying the theme. ● Work together to select strong evidence from a story that supports the claim/theme. ● Participate in lessons with the school librarians will review how to effectively embed evidence (citations) into their own writing.
That there are expected formats and procedures for formal high school writing.	<ul style="list-style-type: none"> ● Participate in lessons with the school librarians who will review MLA format and MLA citation. They will discuss why the format is used. They will teach a lesson with each class. ● Discuss formal writing expectations (i.e. no personal pronouns, informal vs. formal tone, etc.)

REGION 5 UNIT ORGANIZER

How to engage in collaborative discussions	<ul style="list-style-type: none"> Participate in discussions in small groups and with the whole class on pertinent texts throughout the unit.
to analyze character development throughout a story	<ul style="list-style-type: none"> Plot how a character changes throughout a story by various means including teacher modeling and using graphic organizers.
Suggested Learning Activities	
<i>In Order to Learn:</i>	<i>Students will:</i>
Formal Writing	<ul style="list-style-type: none"> Review models of exemplary student writing by reading the models and identifying where they would fall on the rubric and why.
Analyzing theme	<ul style="list-style-type: none"> Watch other Pixar shorts to help them practice determining the theme (using the various organizers noted above) and finding evidence in the shorts to support their thematic statements: Hair Love, Destiny, One Small Step
Our identities are shaped by various factors and can change throughout our lives.	<ul style="list-style-type: none"> Write about their identities both formally and informally, such as by: <ul style="list-style-type: none"> interviewing a classmate writing about names writing about an essential component of their identities as an example: <u>Identity Slideshow</u> (Use this slideshow for possible identity activities)

Revision History

Revision Date	Explanation of change(s) made to document

REGION 5 UNIT ORGANIZER

Grade/Subject 9-12	English 1, Grade 9
Unit Title	Hero's Journey
Overview of Unit	The thematic focus for this unit is the hero's journey and how the pattern of the journey applies to various texts. The main skills for this unit include students developing the topic with well-chosen, relevant, and sufficient facts, extended definitions, concrete details, quotations, or other information and examples appropriate to the audience's knowledge of the topic. The final performance task will be to complete a writing assessment that connects the hero's journey to various texts effectively using specific evidence to support their thesis.
Pacing	8-10 weeks

Background Information For The Teacher (Unit Overview)

Rationale:

In this unit, we begin with the question "What makes a person a hero?" From there, students will learn about Joseph Campbell's "hero's journey." The hero's journey is reflected in various texts, and the monomyth archetype is reflected across cultures. This focus on the hero and the hero's journey allows students to connect the journey to movies, other stories, music, paintings, and even their own lives. Nearly every story they will ever read connects to the hero's journey. This will give students a sense of what characteristics heroes embody and will help them apply this knowledge when analyzing literature and also recognizing these traits in real life.

Key Learning/Big Ideas:

- Read and comprehend complex literary and informational texts independently and proficiently
- Read closely to determine what the text says explicitly and to make logical inferences from it

REGION 5 UNIT ORGANIZER

- Develop the topic with well-chosen, relevant, and sufficient facts, extended definitions, concrete details, quotations, or other information and examples appropriate to the audience's knowledge of the hero

Essential Questions

Essential Questions

- What is Joseph Campbell's "Hero's Journey" and how do modern stories still illustrate it?
- How is the Hero's Journey universal in different types of media?
- What are the qualities of a hero?
- What heroes do we know in real life, and what makes them heroes?

Core Content Standards

Content Specific Standards (NGSS, SS Framework, CCS, etc.)

- **CCSS.ELA-Literacy.W.9-10.2.b:** Develop the topic with well-chosen, relevant, and sufficient facts, extended definitions, concrete details, quotations, or other information and examples appropriate to the audience's knowledge of the topic.
- **CCSS.ELA-Literacy.RL.9-10.9:** Analyze how an author draws on and transforms source material in a specific work (e.g., how Shakespeare treats a theme or topic from Ovid or the Bible or how a later author draws on a play by Shakespeare).
- **CCSS.ELA-Literacy.RL.9-10.7:** Analyze the representation of a subject or a key scene in two different artistic mediums, including what is emphasized or absent in each treatment (e.g., Auden's "Musée des Beaux Arts" and Breughel's Landscape with the Fall of Icarus).
- **CCSS.ELA-Literacy.RL.9-10.10:** By the end of grade 9, read and comprehend literature, including stories, dramas, and : poems, in the grades 9-10 text complexity band proficiently, with scaffolding as needed at the high end of the range.

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	<ul style="list-style-type: none"> ● CCSS.ELA.9-10.SL.1 Initiate and participate effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on Grades 9–10 topics, texts, and issues, building on others’ ideas and expressing their own clearly and persuasively
Portrait of the Graduate Characteristics	<ul style="list-style-type: none"> ● Collaborator ● Communicator ● Empathizer ● Problem Solver ● Planner

K-U-D	
UNDERSTANDS	
<p>Students will understand that:</p> <ul style="list-style-type: none"> ● The hero’s journey archetype exists in many classic and modern texts. ● Thematic connections exist between different depictions of heroes. ● Writers use evidence to support claims made to add credibility to their thinking. ● There are expected formats and procedures for formal writing. 	
KNOW	DO
<ul style="list-style-type: none"> ● hero’s journey archetype ● monomyth ● physical vs. emotional journey 	<ul style="list-style-type: none"> ● identify hero’s journey archetype in various texts ● identify different characteristics of a hero in different mediums and reevaluate that definition with more information

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- claim

- engage in collaborative discussions in small groups and with the whole class
- synthesize what it means to be a hero by using various sources
- organize ideas clearly into paragraphs with topic and concluding sentences with specific evidence from various texts

Common Student Misconceptions for this Unit

Students might mistakenly believe:

- All heroes look a certain way (they have to be big and strong, wear capes/tights).
- Anyone can be a hero.
- Any quotation from a text is relevant and can help support ideas.

Unit Assessment

Performance Assessment

*(Performance Task = "An Inquiry")

Task Overview: (directions for teachers, including what the task is, how it's authentic, how it might be differentiated, materials, etc.)

Other (Formative, quizzes, tests, etc.)

Teachers will give students a variety of writing lessons that will help students

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Students will be asked to write an essay about at least one major trait that makes a person a hero using evidence from course reading, Campbell's hero's journey, and a hero they know in their own life. The thematic statement students craft need to include at least one common hero trait that links their reading and their personal hero with the hero's journey.

At the beginning of this unit, students will have interviewed someone who they feel is a hero. They will keep referring back to their personal hero as they read various texts such as core texts. Students can keep going back to this interview, and they may even realize their personal hero has changed as they learn and read about heroes. Ultimately, their interview will be part of their final essay for this unit.

Teachers can differentiate this final assessment by choosing different stories by reading modified texts, using templates to help students organize their ideas, and modifying the length of the essay.

Student Directions: (link to Google document that will be given to students)

[Final Assessment for Hero's Journey](#)

An Introduction to The Hero's Journey

This packet offers an overview to various heroes and various mediums. This prompts students to evaluate what constitutes a hero. This will be completed after Joseph Campbell's cycle is introduced.

Hero essay midterm exam prep work

Hero Essay Midterm, Graphic Org

These documents will be used to help students prepare for the midterm essay. (We will add more to this in December to scaffold this essay).





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Supplemental Materials and Resources





- CommonLit
- TED Talks
- YouTube for Pixar

Texts			
Required Texts			
Title	Author	Rationale	Lexile Level (where applicable)
<u>"Hero's Test"</u>	Allisoun Witting	This anchor text is an adaptation of the Greek myth of Theseus who bravely kills the Minotaur. This text allows for conversations about what makes Theseus a hero and how his journey reflects many of the stages of the hero's journey. This text allows students to gain some knowledge of Greek mythology which is frequently alluded to in other texts such as <i>A Midsummer Night's Dream</i> (a suggested text in 9th grade English).	900-1000
Campbell's Hero's	Joseph Campbell	This packet explains the stages of Campbell's	


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Journey Packet  English I- Hero's...		Hero's Journey along with a visual. This gives the students the basic understanding of the cycle that ties all hero stories together.	
<u>Hero Cycle Video</u>	Matthew Winkler and Kirill Yeretsky	Visually explains the stages of the hero's journey and how it applies to various classic and modern texts.	
<u>An Introduction to The Hero's Journey</u> (packet)	Various authors	This packet offers an overview to various heroes and various mediums. This prompts students to evaluate what constitutes a hero. This will be completed after Joseph Campbell's cycle is introduced.	
Suggested Texts			
<i>The Odyssey</i>  <i>The Odyssey Ro...</i>  <i>The Odyssey - S...</i>	Homer	<i>The Odyssey</i> is one of the earliest and most influential examples of the Hero's Journey, a narrative structure famously outlined by Joseph Campbell. Odysseus' journey follows many of the key stages that Campbell identifies:	Robert Fagles translation: ~1000L-1100L Samuel Butler translation: ~1050L-1150L
<i>All Quiet on the Western Front</i>  <i>All Quiet on the ...</i>	Erich Maria Remarque	Teaching <i>All Quiet on the Western Front</i> as an example of the Hero's Journey provides a nuanced exploration of how this archetypal narrative structure can be subverted or challenged. Although Remarque's novel doesn't follow the traditional "heroic" arc, its portrayal of a young soldier's journey through the horrors	~830L




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		of World War I offers an alternative view of the Hero's Journey.	
<i>A Tale of Two Cities</i>  A Tale of Two Ci...	Charles Dickens	Teaching <i>A Tale of Two Cities</i> as an example of the Hero's Journey offers students an opportunity to explore a complex text that can both align and deviate from the archetypal story structure.	~990L
"Hero's Return"  Hero's Return.pdf	Kristin Hunter	This is another short story that models certain stages of the Hero's Journey.	~730L
Independent choice reading book (from this list created by librarians:  Novel Choices f...	Various Authors	Students select an independent reading book to identify how the Hero's Journey is reflected in the story and what it means to be a hero.	N/A
Hero's Journey and Buddha Story  Heros journey a...		This is called "Monomyth in Legend: The Story of the Buddha." This very short retelling of the Buddha includes some of the main stages of the hero's journey. This also allows students to realize that the hero's journey is an archetype because it crosses cultures. Students can think of other religious figures or other characters from stories who followed the heroic journey as the Buddha (aka Siddhartha Gautama).	

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Learning Plan	
Required Learning Activities	
<i>In Order to Learn :</i>	<i>Students will:</i>
To compare depiction of hero's journey archetype in various texts	<ul style="list-style-type: none"> ● Watch this introductory video: Hero Cycle Video and learn the twelve stages of Joseph Campbell's monomyth. ● Identify the hero's journey cycle in various stories they know (short film, short story, full-length film, full novels). Some suggestions can be found in the hero's journey slideshow.
To identify different characteristics of a hero in different mediums and reevaluate that definition with more information	<ul style="list-style-type: none"> ● Evaluate what constitutes a hero. This will be completed after Joseph Campbell's cycle is introduced. ● Complete this packet: An Introduction to The Hero's Journey This packet prompts students to evaluate what constitutes a hero. This will be completed after Joseph Campbell's cycle is introduced.
To engage in collaborative discussions in small groups and with the whole class	<ul style="list-style-type: none"> ● Participate in small group or whole class discussions using a variety of strategies
To synthesize what it means to be a hero by using various sources	<ul style="list-style-type: none"> ● Complete a graphic organizer to articulate what it means to be a hero by using various sources of support ●  Hero Essay Midterm, Graphic Org
To organize ideas clearly with topic and concluding sentences and evidence to support claims	<ul style="list-style-type: none"> ● Look at models of writing and identify topic and concluding sentences and how evidence is woven into the text.

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Suggested Learning Activities	
<i>In Order to Learn :</i>	<i>Students will:</i>
To identify different characteristics of a hero in different mediums and reevaluate that definition with more information	<ul style="list-style-type: none"> Brainstorm heroic qualities by doing this activity and using it as a basis for class discussion:  English I- Odyssey, Hero Card
To identify different characteristics of a hero in different mediums and reevaluate that definition with more information	<ul style="list-style-type: none"> Examine <u>complex scenarios</u> in order to refine a hero definition.
To compare depiction of hero's journey archetype in various texts	<ul style="list-style-type: none"> Watch the following videos on their own or in class and take notes on them. They will then make connections to three specific videos. <u>Allusions in The Odyssey</u> Teachers may use this slideshow to assist with the unit: <u>Hero's Journey Unit Slideshow</u> Complete this independent reading project:  English I- Hero Independent Reading Project
To identify different characteristics of a hero in different mediums and reevaluate that definition with more information	<ul style="list-style-type: none"> Respond to this journal prompt:  English I- Odyssey, Cave Journal.docx This document is from Perfection Learning and is a companion piece to both "Hero's Test" (required text) and "Hero's Return" (suggested text). This document will be helpful for teachers who need to use modified assignments that are easier for students. For example, for students who struggle to come up with ideas on the required Hero's Journey Packet, students can instead use the Anticipation Guide in this packet. There are also follow-up activities that can serve as formative assessments to prepare students to think about heroes and what shapes them--an essential part of the final assessment. This is a 118 page document in the Perfection Learning unit called <i>To Be a Hero</i>. https://www.perfectionlearning.com/common/series/tg_tobeahero.pdf

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Revision History	
Revision Date	Explanation of change(s) made to document

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Grade/Subject	Grade 9/ English 1
Unit Title	Why do people fight for justice?
Overview of Unit	The social justice unit focuses on the skills of speaking, listening, and arguing fairly and intelligibly. Much of our reading revolves around the Holocaust memoir <i>Night</i> by Elie Wiesel and other supplemental texts and current events to assist students in understanding social justice. Our culminating assessment will be an argumentative piece on a social justice issue about which students are passionate.
Pacing	8 week

Background Information For The Teacher (Unit Overview)

Rationale:

This unit encourages students to think about the concept of social injustice through the reading of *Night* and supplemental texts. We also want to encourage constructive and respectful discourse so that students can learn to share their views, listen to others, and disagree in respectful ways. This is important because this is a life skill that will allow them to be productive citizens who can effectively communicate and empathize with the ideas of others. We then seek to empower them to use their voices to inform and persuade others about the injustices that matter most to them. This will require them to clearly state their ideas, use logical evidence to support their opinions, and acknowledge the other side of an issue while understanding that their ideas may not be the same opinions of others. We start by considering the question: *What are the causes and consequences of social injustice?*

Key Learning/Big Ideas:

- Construct a written and/or verbal argument by learning about rhetorical devices and claims/counterclaims.
- Develop speaking and listening skills to engage effectively in small and large group collaborative discussions.
- Evaluate and analyze the arguments of various texts (written, auditory, and visual) in terms of effectiveness, purpose, and integrity.

Essential Questions

Essential Questions

- What are the causes and consequences of social injustice?
- How do the examples of injustice in the stories we read/view relate to modern day examples of injustice?

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- What makes strong evidence to support an argument?
- Why is it important to consider your audience, purpose, and task as a speaker/writer?
- What should I be aware of when speaking in small and larger groups? What does "group etiquette" mean?

Core Content Standards

Content Specific Standards (NGSS, SS Framework, CCS, etc.)

- W.9-10.1a. Introduce precise claim(s), distinguish the claim(s) from alternate or opposing claims, and create an organization that establishes clear relationships among claim(s), counterclaims, reasons, and evidence.
- W.9-10.1b. Develop claim(s) and counterclaims fairly, supplying evidence for each while pointing out the strengths and limitations of both in a manner that anticipates the audience's knowledge level and concerns.
- W.9-10.1c. Use words, phrases, and clauses to link the major sections of the text, create cohesion, and clarify the relationships between claim(s) and reasons, between reasons and evidence, and between claim(s) and counterclaims.
- W.9-10.1d. Establish and maintain a formal style and objective tone while attending to the norms and conventions of the discipline in which they are writing.
- W.9-10.1e. Provide a concluding statement or section that follows from and supports the argument presented.
- W.9-10.1. Write arguments to support claims in an analysis of substantive topics or texts, using valid reasoning and relevant and sufficient evidence.
- SL.9-10.1 Initiate and participate effectively in a range of collaborative discussions on relevant topics, texts, and issues
- SL.9-10.3 Evaluate speaker's reasoning and use of evidence, identifying any fallacious reasoning or exaggerated or distorted evidence; comments are appropriate to purpose, audience, and task
- SL.9-10.4 Present information, findings, and supporting evidence clearly, concisely, and logically such that listeners can follow the line of reasoning
- SL.9-10.6. Adapt speech to a variety of contexts and tasks, demonstrating command of formal English when indicated or appropriate.
- RL.9-10.4. Determine the meaning of words and phrases as they are used in the text, including figurative and connotative meanings; analyze the cumulative impact of specific word choices on meaning and tone (e.g., how the language evokes a sense of time and place; how it sets a formal or informal tone).

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- RI.9-10.6. Determine an author's point of view or purpose in a text and analyze how an author uses rhetoric to advance that point of view or purpose.
- RI.9-10.3. Analyze how the author unfolds an analysis or series of ideas or events, including the order in which the points are made, how they are introduced and developed, and the connections that are drawn between them.

Portrait of the Graduate Characteristics

- Collaborator
- Communicator
- Empathizer
- Problem Solver
- Planner

CELP Standards

- **Construct meaning from oral presentations and literary and informational text through grade-appropriate listening, reading, and viewing**
- Participate in grade-appropriate oral and written exchanges of information, ideas, and analyses, responding to peer, audience, or reader comments and questions
- Speak and write about grade-appropriate complex literary and informational texts and topics
- Construct grade-appropriate oral and written claims and support them with reasoning and evidence
- Conduct research and evaluate and communicate findings to answer questions or solve problems
- Analyze and critique the arguments of others orally and in writing
- Adapt language choices to purpose, task, and audience when speaking and writing
- Determine the meaning of words and phrases in oral presentations and literary and informational text
- Create clear and coherent grade-appropriate speech and text
- Make accurate use of standard English to communicate in grade appropriate speech and writing

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K-U-D

UNDERSTANDS

Students will understand that:

- Rhetorical strategies, when used well, can effectively persuade an audience.
- There are multiple causes and consequences of social injustice.
- When we respectfully engage in discourse, whether we agree or disagree, we can expand our understanding of different perspectives.

KNOW

- social justice
- logos
- ethos
- pathos
- propaganda
- bystander / bystander effect
- Holocaust
- anti semitism
- dehumanization/"othering"

DO

- create claims
- refute counterclaims
- argue respectfully and address all sides of an issue
- use evidence to support your claims and counterclaims
- use reasoning to prove arguments
- identify rhetorical strategies to persuade an audience
- engage in small and large discussion groups about social injustice topics
- analyze persuasive texts for elements of propaganda
- analyze informational texts for rhetorical or persuasive devices

Common Student Misconceptions for this Unit

Students might mistakenly believe:

- Social injustice is any unfairness (i.e. Mom says you can't stay out late, etc.).

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- Social injustice is only historical.
- Arguing means yelling and confrontation.
- Intentionally divisive commentary is an effective argument.
- “Discourse” does not mean “debate.”
- Students should understand they can express ideas in a way that does not cause substantial disruption or interfere with the rights of others.

Unit Assessment

Performance Assessment

*(Performance Task = “An Inquiry”)

Task Overview: (directions for teachers, including what the task is, how it’s authentic, how it might be differentiated, materials, etc.)

Give students the linked assignment below that explains the task. Explain that this is an authentic task because it is asking students to think about a real-life issue that they want to change. They should imagine a real audience for their piece. This can be easily differentiated through the style of the final product. Students can write essays, do podcasts, etc. based on what will best suit students in a particular class.

Student Directions: (link to Google document that will be given to students)


[CLICK HERE](#) to access assignment

Other (Formative, quizzes, tests, etc.)

- Give students at least one graded discussion which could be in the form of a fishbowl, socratic seminar, small group/pods, Harkness, etc.
- Possibly - Listening and responding to Resistance (and other) Testimonies (TED-Ed talk, Echoes and Reflections: A Multimedia Curriculum on the Holocaust)
- Tracing his purpose/argument throughout the text:
 - What is his purpose?
 - What strategies does he use to express that purpose?
 - Ask kids to track those strategies throughout the book
 - Can be in a journal
 - Can be a short essay
 - Can be a chart
 - Can be a presentation
 - Can be as big or small as you deem appropriate for your students and timing

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Supplemental Materials and Resources


-  Arguing for Justice slideshow (shared)
- U.S. Memorial Holocaust Museum
<https://encyclopedia.ushmm.org/content/en/project/the-holocaust-a-learning-site-for-students?parent=en%2F11222>
- Echoes and Reflections Website
<https://echoesandreflections.org/>
- [Elie Wiesel's Acceptance Speech for the Nobel Peace Prize](#)
- [20 Photos That Change the Holocaust Narrative](#)
- <https://www.learningforjustice.org/discussing-war-and-conflict-resources-for-educators-parents-and-caregivers>

Texts

Required Texts

Title	Author	Rationale	Lexile Level (where applicable)
<i>Night</i>	Elie Wiesel	Teaching <i>Night</i> promotes historical awareness, literary analysis, empathy, critical thinking, and ethical reflection. It equips students with the knowledge and skills needed to engage thoughtfully with complex issues and prepares them to become informed and compassionate global citizens.	590L
<u>"The Man in the Crowd"</u>	Isabel Wilkerson	Wilkerson's writing employs persuasive techniques like: ethos, pathos, and logos. It provides students	1250L

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		with a mentor text to engage in discussion about persuasive techniques.	
<u>Elie Wiesel's Nobel Peace Prize Acceptance Speech</u>	Elie Wiesel	Wiesel's writing employs persuasive techniques like: ethos, pathos, and logos. It provides students with a mentor text to engage in discussion about persuasive techniques.	925L
Suggested Texts			
<u>Animal Farm</u>	George Orwell	Teaching <i>Animal Farm</i> promotes historical awareness, critical thinking, and ethical reflection. It also shows students how an author uses rhetorical devices (satire and allegory) to make an argument in a literary text.	1170L
<u>Message to Russian Soldiers</u>	Arnold Schwarzenegger	Teaches how speakers/writers use rhetorical devices to persuade an audience, relates to current events of war relevant to social injustice.	
 <u>Animal Farm I Ha...</u>	George Orwell, Martin Luther King, Jr., and John Lennon	Teaches how speakers/writers use rhetorical devices to persuade audiences.	1170L and 770L
<u>A Tale of Two Cities</u>	Charles Dickens	Teaching <i>A Tale of Two Cities</i> promotes historical awareness, critical thinking, and ethical reflection. It also shows students how an author uses rhetorical devices (like antithesis and symbolism) to highlight various cultural dilemmas in a literary text.	1130L
<u>"Less than Human"</u>	David Livingstone Smith	Teaches about the psychology of dehumanization and how it makes injustice more likely.	
<u>Anti-Semitic Propaganda</u>	Various historical posters	Teaches how propaganda was used to increase anti-semitism and manipulate the public	

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"Elie Wiesel and the Agony of Bearing Witness"	Edna Friedberg	Teaches about the challenges of bearing witness and how not all trauma survivors feel able to do it.	
Elie Wiesel Speech: https://www.youtube.com/watch?v=keLT6bp7wo&t=1s	Elie Wiesel	Elie Wiesel Speech (10 mins) on hope, compassion, and the power of youth	
Monster Quotation Analysis: W English I- Night, M...	Primo Levi	This is helpful to get into <i>Night</i> as an anticipation guide type of discussion.	

Learning Plan

Required Learning Activities

In order to learn:	Students will:
To identify rhetorical strategies such as ethos, pathos, and logos.	<ul style="list-style-type: none"> Review this list of persuasive strategies in speech and writing before identifying them in mentor texts. Read "The Man in the Crowd" and circle/highlight examples of persuasive techniques (ethos, pathos, logos, etc.). Wilkerson used to persuade her audience. Have a whole class or small group discussion about her purpose, what techniques she uses, and whether or not she is effective. <ul style="list-style-type: none"> "The Man in the Crowd" excerpt from <i>Caste</i> by Isabel Wilkerson
To discuss the techniques, purpose, and effectiveness of a piece of work (speech)	<ul style="list-style-type: none"> Read Elie Wiesel's Nobel Peace Prize speech, identify the claim, and circle/highlight examples of persuasive techniques and evidence that he uses in his speech to persuade his audience. Participate in a whole class or small group discussion about his purpose, what techniques he uses, and whether or not he is effective.

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	<ul style="list-style-type: none"> Elie Wiesel's Nobel Peace Prize SPEECH
Explore causes and consequences of social injustice	<ul style="list-style-type: none"> Create a T chart (physically or digitally) and list possible causes and consequences of social injustice. Discuss examples from literature, history, and current events. This will be an ongoing list throughout the entire unit that we will add to as we read/view class texts.
Engage in discourse to expand understanding of different perspectives	<ul style="list-style-type: none"> Engage in a graded discussion (type of discussion based on the class needs) in order to engage in discourse to expand their understanding of different perspectives of social justice. Link to graded discussion template and rubric
Create claims and counterclaims	<ul style="list-style-type: none"> Examine (with teacher guidance), interact with, and respond to prompts in the slide show about writing claims and counterclaims. This is a formative activity in which they will practice the skill and receive feedback from classmates and their teacher. Write a Claim and Counterclaim slide show Practice a Counterclaim W English I- Claims and Counterclaims handout.docx
Analyze persuasive texts for elements of propaganda	<ul style="list-style-type: none"> Analyze persuasive texts for elements of propaganda when learning about the history of antisemitism with this video from Echoes and Reflections: Antisemitism This video gives students the foundational information necessary to understand the causes of the Holocaust, including examples of propaganda against the Jews
Suggested Learning Activities	
In order to learn:	<i>Students will:</i>
About experiences of the Holocaust/ building empathy/ understanding causes and consequences of genocide	<ul style="list-style-type: none"> Reflect on testimonials of Holocaust survivors Introduction to Night testimonials Survivor Testimony
Concepts and situations associated with the Holocaust	<ul style="list-style-type: none"> Explore information about the Holocaust using the website of the United States Holocaust Memorial Museum. Topics of the Holocaust: An Introductory Webquest
About responses to injustice, such as "resistance" by watching some testimonials	<ul style="list-style-type: none"> Reflect on testimonials regarding resistance W English I- Night, Resistance Activity.docx JEWISH RESISTANCE DURING THE HOLOCAUST

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To connect big ideas in text using various mediums	<ul style="list-style-type: none"> Read Poem, images, and music related to the <i>Night</i> chapter about Julie's death Julie's Violin
To address rhetoric and claim/counterclaim	<ul style="list-style-type: none"> About Holocaust denial addressing claim/counterclaim and rhetoric W English I- Night, Holocaust Denial.docx

Revision History

Revision Date	Explanation of change(s) made to document

<https://www.learningforjustice.org/discussing-war-and-conflict-resources-for-educators-parents-and-caregivers>

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Grade/Subject 9-12	Grade 9/English I
Unit Title	Why do stories matter?
Overview of Unit	This is a writing unit that focuses on skills of narrative technique and the purpose behind telling our stories. We use mentor texts to model techniques and writing prompts to help generate ideas.
Pacing	3-4 weeks

Background Information For The Teacher (Unit Overview)

Rationale:

After reading the memoir *Night* in Unit 3 and focusing on the power of story and Wiesel's purpose in sharing his experience, we want to empower students to embrace and share their own stories which can be cathartic and empathy building while also challenging students to write in a new mode. It also bookends the year because we began with the Identity Unit, asking students to dive into what factors shape identity within themselves and others, and now we end the year by pushing them to reflect on themselves and use their writing skills to express a purposeful story. We start by posing the questions, "Why do we share stories? How do we share stories effectively?"

Note to Teachers: *this unit could potentially unlock or bring up trauma for students. Be aware and get appropriate school support as needed.*

Key Learning/Big Ideas:

- Evaluate and analyze the narrative techniques of various mentor texts (written and oral) in terms of effectiveness and purpose.
- Practice various brainstorming prompts and strategies to find personal stories.
- Learn how to be discerning in sifting through our stories to find a meaningful story worth telling.
- Sharing stories with each other to build empathy for one another.

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Essential Questions

Essential Questions

- Why do we share stories?
- What makes a good story?
- How do we share stories?

Core Content Standards

Content Specific Standards (NGSS, SS Framework, CCS, etc.)

- CCSS.ELA-LITERACY.W.9-10.3: Write narratives to develop real or imagined experiences or events using effective technique, well-chosen details, and well-structured event sequences.
- CCSS.ELA-LITERACY.W.9-10.3.A: Engage and orient the reader by setting out a problem, situation, or observation, establishing one or multiple point(s) of view, and introducing a narrator and/or characters; create a smooth progression of experiences or events.
- CCSS.ELA-LITERACY.W.9-10.3.B: Use narrative techniques, such as dialogue, pacing, description, reflection, and multiple plot lines, to develop experiences, events, and/or characters.
- CCSS.ELA-LITERACY.W.9-10.3.C: Use a variety of techniques to sequence events so that they build on one another to create a coherent whole.

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	<ul style="list-style-type: none"> ● CCSS.ELA-LITERACY.W.9-10.3.D: Use precise words and phrases, telling details, and sensory language to convey a vivid picture of the experiences, events, setting, and/or characters. ● CCSS.ELA-LITERACY.W.9-10.3.E: Provide a conclusion that follows from and reflects on what is experienced, observed, or resolved over the course of the narrative. ● CCSS.ELA-LITERACY.W.9-10.4: Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience. (Grade-specific expectations for writing types are defined in standards 1-3 above.) ● CCSS.ELA-LITERACY.W.9-10.5: Develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience. (Editing for conventions should demonstrate command of Language standards 1-3 up to and including grades 9-10 here.)
Portrait of the Graduate Characteristics	<ul style="list-style-type: none"> ● Collaborator ● Communicator ● Empathizer ● Problem Solver ● Planner

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K-U-D

UNDERSTANDS

Students will understand that:

- A willingness to explore their own memories and experiences can yield an endless supply of inspiring ideas.
- Narrative techniques, when used well, can effectively create an engaging, relatable, and purposeful story.
- When we respectfully engage in storytelling, whether we see ourselves in the story or not, we can expand our understanding of different perspectives.

KNOW

- narrative techniques: sensory detail, dialogue, foreshadowing, point of view, voice, tone/mood, surprise, suspense,
- structural choices: in medias res, orient the reader in the beginning, chronological, moment of change/moment of reflection

DO

- write a narrative using effective narrative techniques
- evaluate effectiveness of mentor texts using this form.
- produce a formal essay by engaging in writing process of brainstorming, drafting, revision, and sharing
- include aspects of an effective narrative in their writing
 - purpose, audience, details, and event sequences and conclusion

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Common Student Misconceptions for this Unit

Students might mistakenly believe:

- Just because something interesting/funny/sad happened to them it automatically makes a good story.
- They don't have any experiences worthy of writing a story.
- Telling a story means you have to reveal your deepest secrets.
- Writing should be perfect and complete in the first draft.

Unit Assessment

Performance Assessment

*(Performance Task = "An Inquiry")

Task Overview: (directions for teachers, including what the task is, how it's authentic, how it might be differentiated, materials, etc.)

Give students the linked document [here](#). Tell them that this is an authentic task because they are going to write a story that they will give to someone in their life to help them understand who they are as a person.


Student Directions: ([link to Google document](#) that will be given to students)

Other (Formative, quizzes, tests, etc.)

- Writing prompts to promote brainstorming and practice narrative techniques
- Possibly a graphic organizer



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Supplemental Materials and Resources

- Narrative Unit slideshow: Includes links to written and oral mentor texts and writing prompts
- New York Times Learning Network: <https://www.nytimes.com/2019/08/22/learning/personal-narrative-writing-unit.html>
- Narrative Elements handout:  English I- Narrative, elements




Texts

Required Texts

Title	Author	Rationale	Lexile Level (where applicable)
<u>A God Who Remembers</u>	Elie Wiesel	This text is a good bridge between the social justice unit and the narrative unit since students read <i>Night</i> during Unit 3.	
 Cracks in the Pa...	Adam Bernard Sanders	This text is a good example of description and figurative language. The ending is also a great example of a clear purpose and resolve without being overt.	
 Perfectly Pan-Fri...	Charis June Lee	This is a diverse text that has great description.	

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Suggested Texts

 The Wall by Will...	Will Smith	This text is a good example of voice in first person point of view. There is also a strong purpose he weaves through the story and makes clear by the end.	
 Bike Off Roof: N...	Matthew Dicks	This story is helpful to show students in giving them inspiration for an idea because it is relatable. There is humor, heart, and great description. This is also a good example of what Matthew Dicks calls the “5 second moment” see: <u>excerpt from Storyworthy by Matt Dicks</u>	
 Narrative Unit: ...	Jeni Bonaldo	This slideshow that Jeni Bonaldo put together has a bunch of other narratives you can pick from depending on your needs.	
<i>Night</i>	Elie Wiesel	<i>Night</i> is a memoir depicting Wiesel's journey in Auschwitz. He uses many narrative techniques such as but not limited to purpose, pacing, audience, dialogue, description, mood, tone, and conclusions.	
<i>The Odyssey</i>	Homer	The <i>Odyssey</i> works as an example of narrative since in the four “adventure chapters” Odysseus tells the story of his journey home. This section can be read during the 3-4 week period of the unit.	

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<i>Speak</i>	Laurie Halse Anderson	As a model, <i>Speak</i> provides students with a foundation for various narrative techniques. These techniques include, but are not limited to sensory details, foreshadowing, mood/tone, point-of-view, and voice.	
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Learning Plan	
Required Learning Activities	
<i>In order to learn:</i>	<i>Students will:</i>
To brainstorm various topics to use as personal narratives	<ul style="list-style-type: none"> Brainstorm possible story ideas by completing the “<u>First, Last, Best, Worst</u>” template. Then, they will highlight 3-4 ideas to use as possible stories. Finally, they will choose one idea and write about it for five minutes. They aren’t required to use that writing as their personal narrative. The activity is meant to show them that they have numerous topics to write about. They should refer back to the list if they are stuck. The linked document above includes a blank template for the activity, but teachers are not required to use the categories created there. Teachers should modify categories to suit the needs of their students. The document also includes teacher models. We encourage teachers to model the activity and to complete it live with students, especially those who might need more support.
To evaluate effectiveness of mentor texts	<ul style="list-style-type: none"> Use <u>this checklist</u> when discussing mentor texts. Then, discuss specific examples from the texts as time allows.
To include aspects of an effective narrative in their writing (purpose, audience, details, and event sequences and conclusion)	<ul style="list-style-type: none"> Use teacher models/ text models to include effective narrative aspects in their writing

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Suggested Learning Activities

<i>In order to learn:</i>	<i>Students will:</i>
To organize a story	<ul style="list-style-type: none"> Watch this video ▶ The Moth Story Map Dante Jackson Moth EDU to learn about how to organize a story into 5 steps. Then they will complete this organizer 📄 Story Mapping from the Moth
To develop ideas for stories to tell	<ul style="list-style-type: none"> Share a personal story with a partner. In a small group, each person will share his/her/their partner's story as if it were his/her/their own, using "I." This is used as an empathy building activity, but it is also a great way to explore storytelling ideas and to work through the parts of a story. See the attached slideshow for information and a step-by-step explanation. Narrative 4 Story Exchange
To use mentor texts as a model for their own writing	<ul style="list-style-type: none"> "Write Beside" a mentor text. This is a technique created by Penny Kittle and Kelly Gallagher which means to take a word, phrase, sentence, etc. from a mentor text and to use it as a jumping off point for their own writing. A student might take something directly from a mentor text such as the repeated phrase "Lay another brick" from "The Wall," or they might borrow a structural/narrative choice. Perhaps they mirror that repetition but with another phrase such as "Take another lap." This helps students to practice narrative skills in an easily accessible way.
To include all elements of a personal narrative in a final written piece	<ul style="list-style-type: none"> Using teacher models of all techniques when creating their personal narrative

Revision History

Revision Date	Explanation of change(s) made to document

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Grade/Subject 9-12	English Grade 10
Unit Title	"Telling Our Stories"
Overview of Unit	Students will read a series of vignettes/narratives, both fiction and nonfiction from several American writers. In-class discussions will focus on understanding both the form of vignettes/narratives and the context in which they were written. Students will then write their own personal vignette or narrative in order to better understand the complex nature of identity as reflected in the texts, and to reflect on the ways in which their own lives are influenced by similar forces.
Pacing	3-4 weeks

Background Information For The Teacher (Unit Overview)

Rationale:

Vignettes, as brief and evocative descriptions or episodes, offer students a concentrated dose of literary techniques. In a compact form, vignettes are excellent tools for honing critical reading skills because they enable students to explore characterization, setting, mood, and theme.

Literature doesn't exist in a vacuum. By exploring the cultural, familial, and historical contexts of stories, students gain a richer, more nuanced understanding of the text and its significance. Analyzing these contexts encourages students to think critically about how external factors influence literature, fostering a more sophisticated approach to textual analysis. This approach exposes students to diverse cultural perspectives, promoting empathy, understanding, and cultural competence – crucial skills in our increasingly interconnected world. By linking literature to historical events and social movements, students develop a deeper appreciation for how literature reflects and shapes society, enhancing their understanding of both American historical context and American literature.

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Encouraging students to tell their own stories promotes self-expression and helps them explore and affirm their identities. In creating their own stories, students can see themselves as part of the ongoing American literary tradition, making literature feel more accessible and relevant. The process of crafting personal narratives encourages students to reflect critically on their experiences, promoting self-awareness and analytical thinking. Crafting personal narratives allows students to apply the literary techniques they've studied, deepening their understanding of these concepts through practical application.

Following their engagement with vignettes, students will write their own personal vignette or narrative, which will serve as a reflective and creative exercise. Writing their own personal vignettes further deepens their understanding of the text and themselves, encouraging students to reflect on and articulate the unique cultural, familial, and historical factors that have shaped their own lives. The final written product not only develops writing skills but also promotes empathy and a broader appreciation for the diverse cultural landscapes within American society, making *The House on Mango Street* and "Where I'm From" crucial texts for fostering both literary and personal growth in young readers.

Key Learning/Big Ideas:

- Recognizing and appreciating diverse perspectives and experiences, and developing empathy through the exploration of character motivations and relationships.
- Engaging with texts that represent various racial, ethnic, cultural, and economic backgrounds.
- Recognizing the role of setting in shaping narratives and themes.
- Analyzing characters' journeys to fulfillment and relating them to students' own lives as well as understanding the importance of perseverance, resilience, and personal values.
- Enhancing skills in articulating ideas through written and oral communication.
- Cultivating a clear and expressive writing style.

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Essential Questions

Essential Questions

- What is the connection among culture, family, and history and how do these factors shape our lives?
- How does the process of reflecting on literature enhance our understanding of that literature?
- How does the process of reflecting on literature enhance our understanding of ourselves and the world around us?

Core Content Standards

Content Specific Standards (NGSS, SS Framework, CCS, etc.)

- CCSS.ELA-LITERACY.RL.9-10.4
- CCSS.ELA-LITERACY.RL.9-10.6
- CCSS.ELA-LITERACY.W.9-10.3
- CCSS.ELA-LITERACY.W.9-10.4
- CCSS.ELA-LITERACY.W.9-10.5
- CCSS.ELA-LITERACY.L.9-10.1

Portrait of the Graduate Characteristics

- Collaborator
- Communicator
- Empathizer
- Problem Solver
- Planner

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K-U-D

UNDERSTANDS

Students will understand that:

- Cultural narratives and family traditions shape one's sense of self and influence personal goals and values.
- Different environments, whether physical, economic, or social, can influence and shape an individual's personal growth and aspirations.
- Personal vignettes/narratives and storytelling are powerful tools for expressing individual experiences and emotions.
- Empathy is crucial for our understanding of those around us and how engaging with diverse perspectives can foster a deeper understanding of others' experiences.
- The intricate connections among family, culture, and personal dreams help to shape us. Students will see how our aspirations can be influenced by our family's expectations, cultural backgrounds, and the historical context of our communities.

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KNOW	DO
<ul style="list-style-type: none"> ● Definitions of: <ul style="list-style-type: none"> ○ Narrative ○ Vignette ○ Internal rhyme ○ Alliteration ○ Personification ○ Metaphors ○ Similes ● The value of personal narratives as part of American literature 	<ul style="list-style-type: none"> ● Read and identify the difference(s) between fictional and non-fictional narratives. ● Explain how an author's use of specific literary devices enhances their writing. ● Analyze literary techniques of vignette/narrative writing. ● Identify a significant moment of change or conflict in text(s) and in their lives. ● Plan their own personal vignettes/narratives. ● Write their own personal vignettes/narratives. ● Edit and revise their own personal vignettes/narratives. ● Make deliberate choices regarding grammar and mechanics in writing as appropriate for a vignette.

Common Student Misconceptions for this Unit

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These can be about content, skills, or processes

Students might mistakenly believe:

- Stories are “just” stories and do not matter in students’ own lives.
- Vignettes/narratives are the products of professional writers, with proper grammar, punctuation, etc.
- Literary/narrative techniques are difficult to identify and use.
- Culture, family, and history have little to do with one’s personal identity.
- Empathy is nice, but not necessary for a student’s development.

Unit Assessment

Performance Assessment

*(Performance Task = “An Inquiry”)

Task Overview: (directions for teachers, including what the task is, how it’s authentic, how it might be differentiated, materials, etc.)

A narrative is another word for story. A vignette is a snapshot in words. A vignette tends to focus on one person, setting, idea, or object as a descriptive exercise, for character exploration, wordplay or just to get something off your mind.

Other (Formative, quizzes, tests, etc.)

- “Four Skinny Trees” and “The Rose From Concrete”
- 2Pac - The Rose That Grew from Concrete ft. Nikki Giovanni audio
- Copy/Change Exercise

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Our stories matter, to us and to other people. Students are writing narratives/vignettes to reflect on themselves and their lives, with the hope of sharing these personal stories with others. Their task is to write two or more narratives/vignettes in the style of *The House on Mango Street*. The idea is to be brief but powerful, to use their words as needed to bring this “snapshot” to life in vivid detail with their choice of narrative technique and developmental details.

Some of the suggested texts can be used to differentiate by level and interest.

Student Directions: (link to Google document that will be given to students)

[Link to the personal narrative/vignette assignment with rubric](#)

Supplemental Materials and Resources

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Texts			
Required Texts			
Title	Author	Rationale	Lexile Level (where applicable)
<u>"Where I'm From"</u>	Misa Sugiura	Sugiura's short story explores themes of connection and belonging, highlighting how our sense of identity is tied to the communities and environments we are part of. This can encourage readers to think about their own communities and how they contribute to their sense of self.	770L
<u><i>The House on Mango Street</i> (whole or excerpts)</u>	Sandra Cisneros	Introducing 10th-grade students to Sandra Cisneros' <i>The House on Mango Street</i> is an essential component of our study of American literature, as it provides an exploration of the connections among culture, family, and family history and their roles in shaping individual identities. Cisneros' collection of vignettes, narrated by the young Chicana protagonist Esperanza, offers an intimate look into the complexities of growing up in a largely Hispanic neighborhood in Chicago. Through Esperanza's experiences, students gain insight into how cultural heritage, family dynamics, and historical context intertwine to influence personal development and aspirations. By engaging with this text, students can better understand the	870L

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		complex nature of identity and the ways in which their own lives are influenced by similar forces.	
Suggested Texts			
<u>"Arm Wrestling with my Father"</u>	Brad Manning	This text detailing the complex relationship between a son and his father is a good representation of physical and emotional relationships changing over time.	
<u>"Where I'm From"</u>	George Ella Lyon	Not to be confused with Misa Sigiura's short story, this poem is a brief exploration of where the narrator comes from: the places, the people, the experiences she had in her childhood home.	
Excerpt from <i>Angela's Ashes</i> chapter 10	Frank McCourt	The author uses the voice as a child, living through this experience. This point of view is important, showing the complex way perspective can influence our view of life's problems.	1110L
<u>"Silk Parachute"</u>	John McPhee	This text detailing the author's relationship with his mother shows another way of writing narrative, with humorous "facts" about his mother then fading to a beautiful analogy between his mother and a silk parachute he received when he was young	

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<u>"The Rose that Grew from Concrete"</u>	Tupac Shakur	This song/poem is about resilience and determination despite environmental obstacles and links nicely with the chapter "Four Skinny Trees" as well as the rest of Esperanza's journey in <i>The House on Mango Street</i>	NP
<i>Ellen Foster</i>	Kaye Gibbons	This coming of age and identity novel pairs nicely with the vignettes of <i>The House on Mango Street</i> by going into the life of Ellen who also is looking for a place to call home	870L

Learning Plan	
Required Learning Activities	
<i>In Order to Learn:</i>	<i>Students will:</i>
Elements of narrative and vignette writing	<ul style="list-style-type: none"> Analyze how chapters in <i>The House on Mango Street</i> use literary techniques of vignette writing <ul style="list-style-type: none"> <u>Literary Elements in <i>The House on Mango Street</i></u> (applying these terms to the chapters in order to later apply to their own writing) <u>Example Assignment for Opening Chapters</u> (not meant to be done by all learners, but rather offering examples of differentiation) <u>Example Assignment for pages 31-42</u> (not meant to be done by all learners, but rather offering examples of differentiation)
The value of personal narratives as part of American literature (Empathizer POG)	<ul style="list-style-type: none"> Develop an appreciation of personal narrative and encourage empathy and hope by exploring sections of <i>The House on Mango Street</i> <ul style="list-style-type: none"> Discuss the character of Esperanza and how she represents hope through her journey through whole class, small group and/or partner discussions.

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	<ul style="list-style-type: none"> ○ <u>Example whole class/small group/partner discussion prompts for during/after the book</u> (not meant to be done by all learners, but rather offering examples of differentiation)
Elements of written vignettes (Communicator POG)	<ul style="list-style-type: none"> ● Apply elements of narratives/vignettes to their own writing by composing, reviewing and revising their narratives/vignettes <ul style="list-style-type: none"> ○ <u>Exemplars</u> of student-written vignettes ○ <u>Example Assignment for pages 31-42</u> (second question deals with finding literary techniques) ○ <u>Peer and Self Review Checklist</u> (with space for reflection)
Suggested Learning Activities	
<i>In Order to Learn:</i>	<i>Students will:</i>
Support and advance ideas using evidence from a text	<ul style="list-style-type: none"> ● Read “Where I’m From” by Misa Sugiura and complete and discuss the assignment <u>“Where I’m From Outsider/ Insider”</u>
Connections between the text and students’ own cultures/interests	<ul style="list-style-type: none"> ● Apply major concepts in the book to their own musical interests <ul style="list-style-type: none"> ○ <u>Thematic Song Assignment</u> ○ <u>Example song</u> (connected to “Four Skinny Trees” and the motifs of resilience and determination)
Narrative technique in other nonfiction works (especially pertaining to concepts of family)	<ul style="list-style-type: none"> ● Identify and analyze narrative technique in samples of narrative essays such as “Silk Parachute” and “Arm Wrestling with my Father” (see annotation texts below for modeling). <ul style="list-style-type: none"> ○ <u>Silk Parachute John McPhee TEXT</u> ○ <u>Silk Parachute John McPhee NOTES</u> ○ <u>Arm Wrestling with My Father TEXT</u> ○ <u>Arm Wrestling with My Father TASK</u> ○ <u>Arm Wrestling Annotated</u> ○ <u>Angela's Ashes Chapter 10 Excerpt TEXT</u> ○ <u>Angela's Ashes Ch. 10 Annotated</u> ○ <u>Compare Arm Silk and Angela's TASK</u>

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Connections between the text and students' own childhoods and experiences

- Apply concepts in the poem to the idea of identity found in *The House on Mango Street*
 - "Where I'm From" (Poem) Brainstorm and Copy/Change

Revision History

Revision Date

Explanation of change(s) made to document

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Grade/Subject	English II Grade 10
Unit Title:	Unit B - Character Development
Overview of Unit	Students will learn about character development and gain insights into how and why authors employ character development in bringing characters to life. This in-depth exploration will broaden students' understanding of individuals in literary works, prompt self-reflection, and foster a deeper understanding of both the literature and their worlds.
Pacing	3-8 weeks

Background Information For The Teacher (Unit Overview)

Rationale:

The unit aims to develop a diverse skill set in students, providing them with tools for critical engagement with literary works and beyond. By helping students identify and analyze underlying messages in literature, the curriculum enhances critical thinking and comprehension. This focus on understanding layers of meaning extends beyond literature to foster a deeper appreciation for storytelling across various mediums, including film, literature, and human interaction.

Moreover, the unit recognizes the significance of cultivating empathy as a crucial skill for navigating interpersonal relationships and succeeding in professional settings where understanding complex personalities is essential. Through exploring the concept of the American Dream, students get the chance to examine cultural and societal ideals, prompting reflection on their own aspirations and paths to fulfillment. Fundamental to this understanding is our need to provide students with an opportunity to interact with texts that reflect characters and settings of different racial, ethnic, cultural, and economic backgrounds.

Additionally, the unit encourages an exploration of physical, economic, regional, and spiritual environments to foster cultural awareness. By incorporating these elements, students not only engage with literature but also gain a broader perspective on the interconnectedness of their

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surroundings and cultural influences. This holistic approach aims to empower students with a comprehensive set of skills and perspectives that go beyond traditional literary analysis.

Key Learning/Big Ideas:

- Analyze the underlying messages within literary works.
- Enhance critical thinking and comprehension.
- Discern layers of meaning in various texts.
- Foster an appreciation for the dynamic nature of storytelling (relevant to film, literature, human interaction.)
- develop empathy (important for interpersonal relationships and professional settings where the ability to navigate complex personalities is crucial.)
- American Dream - allows students to explore cultural and societal ideals and reflect on their own aspirations and pathways to fulfillment.
- Exploration of our physical, economic, regional, and spiritual environment(s) as a means to cultural awareness.

Essential Questions

Essential Questions

- What is the connection among culture, family, and history and how do these factors shape our lives?
- How does our environment/circumstances advance and constrain the pursuit of the American Dream?
- How do complex characters develop over the course of a text, interact with other characters, and advance the plot or develop the theme?

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Core Content Standards	
Content Specific Standards (NGSS, SS Framework, CCS, etc.)	<ul style="list-style-type: none"> ● CCSS.ELA-LITERACY.RL.9-10.1 ● CCSS.ELA-LITERACY.RL.9-10.2 ● CCSS.ELA-LITERACY.RL.9-10.3 ● CCSS.ELA-LITERACY.W.9-10.9 ● CCSS.ELA-LITERACY.W.9-10.6 ● CCSS.ELA-LITERACY.L.9-10.1
Portrait of the Graduate Characteristics	<ul style="list-style-type: none"> ● Collaborator ● Communicator ● Empathizer ● Problem Solver ● Planner

CELP Standards	<ul style="list-style-type: none"> ● Construct meaning from oral presentations and literary and informational text through grade-appropriate listening, reading, and viewing ● Participate in grade-appropriate oral and written exchanges of information, ideas, and analyses, responding to peer, audience, or reader comments and questions ● Speak and write about grade-appropriate complex literary and informational texts and topics ● Construct grade-appropriate oral and written claims and support them with reasoning and evidence ● Conduct research and evaluate and communicate findings to answer questions or solve problems ● Analyze and critique the arguments of others orally and in writing ● Adapt language choices to purpose, task, and audience when speaking and writing ● Determine the meaning of words and phrases in oral presentations and literary and informational text ● Create clear and coherent grade-appropriate speech and text ● Make accurate use of standard English to communicate in grade appropriate speech and writing
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K-U-D

UNDERSTANDS

- A person is inextricably shaped by the explicit and implicit expectations of a culture's legacies.
- Our physical, economic, regional, and spiritual environment(s) can often impede the achievement of the American Dream.
- Culture, family, and history manifest through experience and personal/societal evolution.
- Evidence supports assertions we make in writing by substantiating claims and strengthening the argument.
- The ways complex characters develop and work within a narrative help the reader better understand a story.

KNOW

- theme
- claim
- character change
- complex character
- American Dream (as a concept)
- environment

DO

- analyze themes in various texts
- support and advance ideas using evidence from a text
- create a defensible, evidence-based claim
- substantiate claims with evidence
- propose and defend an interpretation of a text
 - recognize when a character faces an explicit/implicit internal conflict
- apply conventions of Standard English to their own writing
- interpret different depictions of family as expressed through American Literature
- determine how the elements of environment can promote or impede the achievement of the American Dream

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Common Student Misconceptions for this Unit

Students might mistakenly believe:

- Environment is only nature/the outdoors.
- The American Dream is the same idea for everyone.
- Writers don't need to substantiate claims.
- Theme can be stated in a single word or phrase.

Unit Assessment

Performance Assessment

*(Performance Task = "An Inquiry")

Task Overview: (directions for teachers, including what the task is, how it's authentic, how it might be differentiated, materials, etc.)

Two of your friends are arguing about a story they read. They disagree on the themes of the story, which characters are complex, and the roles the characters play in advancing the plot and developing the themes. They turn to you to help settle the dispute and ask you to share your interpretations of themes and characters.

Other (Formative, quizzes, tests, etc.)

- Characterization Exercises
- Character Traits Graphic Organizer

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Students will have two hours to create a draft of an essay analyzing complex character development found in a work(s) of literature.

The task may be differentiated by the choice of text(s) used and whether or not the material is a “cold read.”

Student Directions: (link to Google document that will be given to students)


“Every story has pivotal characters that play an important role in the work. Often, these characters show complexity and change during the course of a story. Your task is to explain how one (or more) of the important characters from the text(s) changes from the beginning of the story to the end of the story.”

Supplemental Materials and Resources

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Texts



Required Texts

Title	Author	Rationale	Lexile Level (where applicable)
 Marigolds	Eugenia W. Collier	This short story shows how identity is shaped by experiences. It also features a dynamic character who changes significantly over the course of the text and allows the reader to see how a theme develops over the course of the text.	1120L
"Why I Love a Country that Betrayed Me" TED Talk 2014x-george-takei-001-5000k.mp4	George Takei	This TED talk shows how people were affected by the internment of Japanese-Americans during WWII and the nuanced perspective of those whose dreams were put on hold or broken by the country that they loved.	1100L (according to CommonLit)

Suggested Texts

"The Yellow Wallpaper"	Charlotte Perkins Gilman	This short story shows internal/external conflict and the loss of sanity in the protagonist as a result of her environment and her husband's gaslighting, relating to both the repression of one's dreams and familial/environmental impacts.	920L
"To Change The World" Enough"	Alice Walker	This poem provides the opportunity to explore poverty and the challenges it poses to accessing the American Dream.	NP

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 To Change The ...			
“Caged Bird”  Caged Bird	Maya Angelou	Teaching “Caged Bird” offers students an exploration of racial injustice, self-resilience and the power of expression, empathy and critical reflection on systemic oppression.	1010L
<i>Ethan Frome</i>	Edith Wharton	<i>Ethan Frome</i> provides the opportunity to explore themes related to the constraints of the American Dream, particularly within the context of environment and family obligations.	1090L
<u>“I Stand Here Ironing”</u>	Tillie Olsen	“I Stand Here Ironing” offers a compelling and nuanced exploration of the American Dream and family dynamics, providing students with a realistic portrayal of the struggles many families encounter in pursuit of the American Dream.	730L
<u><i>A Raisin in the Sun</i></u>	Lorraine Hansberry	The Younger family's dynamics and struggles are central to the narrative. Students can explore family relationships, generational conflicts, and the ways in which economic pressures impact familial bonds.	NP
<u>“This is my letter to the World”</u>	Emily Dickinson	This poem allows students an exploration of isolation, communication and human connection inviting them to contemplate universal themes of solitude and expression.	NP
<i>Kindred</i>	Octavia Butler	This novel shows the impact of familial legacies on the protagonist and the environmental factors that affect her life and dreams.	580L
<i>Warriors Don’t Cry</i>	Melba Patillo Beals	The text offers students the opportunity to understand some aspects of American history that involved racial oppression along with steps society took to ameliorate the injustice.	1000L
<i>Ellen Foster</i>	Kaye Gibbons	This novel shows the family legacies that affect the main character, while her relationship with her best friend allows her to undergo character change that is	870L

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		accessible to students.	
<i>The Crucible</i>	Arthur Miller	This play shows the complex change of its main character alongside the de-evolution of another character. It also deals in cultural legacies and the notion that hysteria and fear are problems in any society in any time period.	1320L
"Sonny's Blues"	James Baldwin	Tracing character development in "Sonny's Blues" offers students an opportunity to analyze how complex characters evolve through their relationships and experiences. By examining the narrator's transformation from a judgmental older brother to an empathetic witness of Sonny's struggles, and Sonny's journey from a troubled addict to an artist finding redemption through jazz, students can develop essential analytical skills while engaging with themes relevant to their own lives.	
<i>Fahrenheit 451</i>	Ray Bradbury	This major piece of American literature highlights the inner conflicts and changes of the protagonist, Guy Montag, as he struggles against a society that does not value critical thinking and reading. This book offers the opportunity to explore concepts of censorship and societal apathy alongside a character who begins to reject this society.	890L
<i>Romeo and Juliet</i>	William Shakespeare	While clearly not American, William Shakespeare's <i>Romeo and Juliet</i> remains a cornerstone of classical literary education, offering students a rich exploration of language, drama, and relatable themes of young love and rebellion (and builds on the introduction of Shakespeare in the ninth grade.)	
<i>To Kill a Mockingbird</i>	Harper Lee	<i>To Kill a Mockingbird</i> is a foundational text for exploring character development in American literature. Its multi-layered characters, moral dilemmas, and exploration of social and historical forces create a compelling narrative that helps students analyze the intricacies of how and why characters evolve. By examining the growth of characters in this novel, students not only gain insight into literary development but are also encouraged to reflect on their own moral	870L

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		frameworks and personal growth.	
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Learning Plan	
Required Learning Activities	
Recognize when a character faces an explicit/implicit internal conflict	<ul style="list-style-type: none"> Read “Marigolds” and find evidence to support an interpretation of the character’s impact on conflict and theme. <u>Graphic organizer on characterization</u>, <u>Graphic organizer on Conflict Analysis: Internal and External</u> <u>Characterization of Lizabeth in “Marigolds”</u>
Support and advance ideas using evidence from a text	<ul style="list-style-type: none"> Watch “<u>Why I Love a Country that Betrayed Me</u>” TED Talk by George Takei and work to select strong evidence to support an interpretation. <ul style="list-style-type: none"> <u>CommonLit Transcript and questions</u> Participate in a mini-lesson on using effective quotations <ul style="list-style-type: none"> <u>Handout: using quotations effectively</u>
Suggested Learning Activities	
The concept of the American Dream	<ul style="list-style-type: none"> Brainstorm the American Dream and see how it has changed over time and applies to different groups <ul style="list-style-type: none"> <u>American Dream Brainstorming</u> Watch the <u>PBS American Portrait “I Dream”</u> <ul style="list-style-type: none"> <u>Documentary Response Writing Assignment</u>
Tracking Characterization/Character Development in <i>The Crucible</i>	<ul style="list-style-type: none"> While reading the play <i>The Crucible</i>, track character traits and changes and ultimately use these for a comparison of character in the play <ul style="list-style-type: none"> <u>Character Tracking charts</u> (can be modified for almost any text)

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Tracking Characterization/Character Development in <i>A Raisin in the Sun</i>	<ul style="list-style-type: none"> While reading the play <i>A Raisin in the Sun</i>, track character traits and changes and ultimately use these for a comparison of character in the play <ul style="list-style-type: none"> <u>Character Tracking chart</u> (can be modified for almost any text)
Comparing Characters	<p>Read “I Stand Here Ironing” and <i>Ellen Foster</i> and <u>reflect on the resilience</u> of the two main characters.</p> <p>Complete the <u>Ellen Foster Project</u> which includes the following topic and question: “FRIENDSHIP AND CHARACTER CHANGE Throughout the novel, the reader learns about Ellen’s relationship with Starletta. Explore the relationship. Does Ellen change as a result of a relationship with Starletta or does the friendship not change Ellen, but only reflects how much she has changed? To what extent does this understanding become one of the novel’s important ideas?”</p>
Considering Two Different Interpretations of Ellen Foster	After reading the novel, <u>Reflect</u> on Ellen Foster as a depressing novel and an uplifting novel.

Revision History

Revision Date	Explanation of change(s) made to document

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Grade/Subject 9-12	English Grade 10
Unit Title	"He's Got My Past Frozen Behind Glass / But I've Got Me"
Overview of Unit	By examining the characters' relationships with their pasts, students will gain insight into the complexities of personal growth and the enduring impact of history on the present. Students will read <i>The Great Gatsby</i> and focus on a deeper understanding of how literature reflects human experiences and societal issues. The culminating essay will allow students to synthesize their learning and articulate their interpretations of one of novel's central messages about the ways in which the past affects the present.
Pacing	3-8 weeks

Background Information For The Teacher (Unit Overview)

Rationale:

As people grow, they have to deal with past mishaps and mistakes, as well as great successes. In many ways, past events can affect, positively or negatively, the present actions, attitudes, or values of a person. This is reflected in many characters in literature. The study of American literature in the tenth grade provides students with a profound opportunity to explore and understand complex human experiences through literary texts. One of the essential themes in literature is the struggle of characters with their pasts and how these pasts shape their present lives. This theme is particularly evident in F. Scott Fitzgerald's *The Great Gatsby*. By reflecting on characters' struggles with their pasts and then writing a literary analysis of *The Great Gatsby*, students will develop critical thinking, analytical writing skills, and a deeper understanding of human behavior and

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societal values. Engaging with characters' struggles with their pasts encourages students to reflect on their own experiences and the broader human condition.

Key Learning/Big Ideas:

- Recognizing and appreciating perspectives and experiences through the exploration of character motivations and relationships.
- Analyzing characters' journeys to fulfillment through an understanding of characters' pasts.
- Understanding how peoples' past experiences impact their current behaviors and decisions.
- Recognizing how literature reflects and critiques societal values and norms.
- Enhancing skills in articulating ideas through written communication.

Essential Questions

Essential Questions

- When must an individual draw the line between obedience to conscience and obedience to society?
- What is the purpose of literary analysis?
- How does one's past shape his/her/their actions, attitudes, or values?

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Core Content Standards	
Content Specific Standards (NGSS, SS Framework, CCS, etc.)	<ul style="list-style-type: none"> ● <u>CCSS.ELA-LITERACY.RL.9-10.1</u> ● <u>CCSS.ELA-LITERACY.RL.9-10.3</u> ● <u>CCSS.ELA-LITERACY.RL.9-10.5</u> ● <u>CCSS.ELA-LITERACY.W.9-10.4</u> ● <u>CCSS.ELA-LITERACY.W.9-10.5</u> ● <u>CCSS.ELA-LITERACY.L.9-10.1</u>
Portrait of the Graduate Characteristics	<ul style="list-style-type: none"> ● Collaborator ● Communicator ● Empathizer ● Problem Solver ● Planner

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K-U-D

UNDERSTANDS

Students will understand that:

- A person must negotiate between individual and societal responsibilities because those responsibilities create expectations that are sometimes in conflict with one another.
- A person is inextricably shaped by the explicit and implicit expectations of American society.
- Engaging in literary analysis allows students to reflect on their own lives, values, and beliefs, promoting personal growth and self-awareness.
- Through exploring characters, themes, and narratives, literary analysis fosters empathy and provides insight into diverse human experiences and perspectives.
- Literary analysis encourages readers to think deeply and critically about texts, fostering skills in analysis, synthesis, and evaluation that are applicable beyond literature

KNOW

DO

Definitions of:

- literary analysis
- diction
- denotation vs connotation
- tone

- Identify and analyze elements of a text that can affect a narrator's reliability.
- Discuss how the narrator's unreliability affects his/her story's credibility, the reader's perception of events, and the overall theme.

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- point of view
- 1st person vs 3rd person narration
- unreliable narrator

The impact that the past has on an individual

- Provide examples to illustrate the narrator's inconsistencies or biases.
- Analyze the character's relationship with the past and how it influences their present actions, attitudes, or values.
- Identify key events in the character's past that are significant to the narrative.
- Interpret the central message of the work as it relates to the character's struggles with their past.
- Compare the character's journey with other characters in the same or different works who face similar issues.
- Synthesize information from different parts of the text to construct a coherent analysis about the character's past and its impact.
- Produce clear and coherent written analysis about the character's past and its impact through planning, revising, editing, and rewriting.
- Cite strong and thorough textual evidence to support analysis

Common Student Misconceptions for this Unit

Students might mistakenly believe:

- The past is behind us.
- We are free to reinvent ourselves without consequence.

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- What a narrator tells us is always reliable.
- Theme can be stated in a single word or phrase.
- Good writing is a quick process.

Unit Assessment	
Performance Assessment	Other (Formative, quizzes, tests, etc.)
<p>Task Overview: (directions for teachers, including what the task is, how it's authentic, how it might be differentiated, materials, etc.)</p> <p>The task for unit C is literary analysis writing. It is authentic and relevant to write because one of the key purposes of literary analysis is to reflect on the writings of others so that a person can better reflect on the world and themselves as illustrated by the text. Literary analysis is specifically distinct from summary. Literary analysis often takes a very persuasive (argument) form, so students need to be prepared to stand by their own analyses.</p> <p>Essay Preparation:</p> <ul style="list-style-type: none"> ● Thesis Development: Students will develop a clear thesis statement that addresses the prompt. ● Evidence Gathering: Collect quotes and examples from the text that illustrate how the chosen character's past affects their present. 	<ul style="list-style-type: none"> ● <u>Essay Graphic Organizer</u> ● <u>In-Class Practice Essay</u>

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- Essay Outline: Create a detailed outline, including an introduction, body paragraphs, and conclusion.
- Drafting and Revising: Write a first draft, receive peer and teacher feedback, and revise for clarity, coherence, and depth of analysis.

Student Directions: (link to Google document that will be given to students)

[Assessment Link](#)

[Single Point Writing Rubric](#)

Supplemental Materials and Resources

Texts

Required Texts

Title	Author	Rationale	Lexile Level (where applicable)
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<i>The Great Gatsby</i>	F. Scott Fitzgerald	This work of literature is considered one of, if not the, great American novel. It represents the 1920s while still remaining relevant to modern issues of wealth, gender, love, and the inescapable hand of the past.	1070L
<p style="text-align: center;">Suggested Texts <i>A menu of potential texts that fit the theme and scope of the unit; Should be varied genres and modes</i></p>			
<i>Kindred</i>	Octavia Butler	<p>“Even as stories of America’s horrific past are pulled from libraries and schools across the country, history continues to live on in our cells. Honest storytelling sheds light on generational trauma, and if we heed its warnings, it can be medicine and possibly an inoculation. As the descendants of enslavers and the enslaved, we are reminded that we can be both monster and alien in our cruelty towards each other and in our ability to adapt and change.”</p> <p><u>Time Magazine</u></p>	580L
<i>The Scarlet Letter</i>	Nathaniel Hawthorne	Reading <i>The Scarlet Letter</i> is essential for understanding key themes in American literature, such as sin, guilt, and redemption. Nathaniel Hawthorne's exploration of individual versus society, the consequences of personal choices, and the complexity of human emotions provides valuable	1280L

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		insights into moral and ethical dilemmas. The novel's rich symbolism and historical context offer students a deep dive into Puritan New England, enhancing their comprehension of American cultural and religious heritage.	
"Recitatif"	Toni Morrison	Toni Morrison's "Recitatif" offers an exploration of how unreliable memories shape perceptions of identity, race, and friendship, challenging readers to question what they think they know about the characters. The story's deliberate ambiguity invites students to critically analyze how personal biases and fragmented recollections influence the way we remember past events. This encourages students to engage with complex themes and understand the limitations of memory.	
"Absolution"	F. Scott Fitzgerald	Reading "Absolution" offers students a deeper understanding of F. Scott Fitzgerald's themes, characters, and narrative techniques. The story explores characters grappling with their pasts, moral dilemmas, and identity. The consistent motifs and symbols, such as the pursuit of the American Dream, and the cultural and social commentary of the 1920s, enhance students' appreciation of Fitzgerald's craft. Encouraging deeper thematic analysis, character studies, and intertextual connections, fostering critical thinking and interpretive skills in literary studies.	

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"The Other Woman"	Sherwood Anderson	The unreliable narrator of the story speaks of being "in love" with his wife, while still being seemingly obsessed with a woman who works nearby. It shows the idea of the unreliable narrator while at the same time demonstrating issues with the idea of love and societal expectations.	
<u>"Valediction"</u>	Sherman Alexie	"Valediction" provides an exploration of a character's struggle to reconcile with his past, reflecting themes of identity, memory, and healing. Through the protagonist's journey, students can examine how personal history shapes one's present and future, a central theme in many works of American literature. This story encourages students to critically consider the ways in which dealing with past experiences can impact an individual's growth and understanding of self.	
"Story of an Hour"	Kate Chopin	"The Story of an Hour" delves into themes such as the constraints of marriage, the yearning for personal freedom, and the complex nature of identity and selfhood. It encourages readers to consider the societal roles and limitations placed on women during the late 19th century. Reading it offers an understanding of early feminist thought and the historical context of women's rights.	
<u>"The Paper Menagerie"</u>	Ken Liu	The narrator reflects on his relationship with his immigrant mother and the magic of his childhood. His changing perspectives over time can create an	

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		unreliable view of his past, as he reassesses his own memories.	
"The Jilting of Granny Weatherall"	Katherine Ann Porter	"The Jilting of Granny Weatherall" tells the story of the last day of a dying woman who has never truly found resolution after the worst event of her life, which happened when she was a young woman.	
"The Yellow Wallpaper"	Charlotte Perkins Gilman	This short story shows internal/external conflict and the loss of sanity in the protagonist as a result of her environment and her husband's gaslighting, relating to both the repression of one's dreams and familial/environmental impacts.	920L
<u>"One Art"</u>	Elizabeth Bishop	The speaker lists her losses, from personal to impersonal, claiming that they are no disaster, but the ending reveals an inner struggle and deep pain.	
<i>A Raisin in the Sun</i>	Lorraine Hansberry	This play deals with issues of the American Dream, race, and how a person's past actions influence future decisions and familial connections.	

Learning Plan

Required Learning Activities

In Order to Learn :

Students will:

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Explore major themes and other elements of narrative in <i>The Great Gatsby</i>	Share their analyses of the characters in <i>The Great Gatsby</i> through small group and whole class discussions. <u>These questions</u> , adapted from <i>Facing History and Ourselves</i> ’ “Compelling Questions for Literary Analysis” can be used for both small group and whole class discussions.
Select and prepare support to advance ideas in an essay.	Compile a list of important quotations as they read the novel. Depending on their comfort with finding quotations, they can use <u>this graphic organizer</u> to help them.
Identify and analyze an unreliable narrator in a text.	Watch <u>this video</u> and think/pair/share on the impact of an unreliable narrator.
Suggested Learning Activities	
<i>In Order to Learn :</i>	<i>Students will:</i>
About ideas related to the text in anticipation of reading	<ul style="list-style-type: none"> Complete Anticipation guide as a pre reading exploration of ideas related to the text <u>Gatsby Anticipation Guide</u>
About different types of perspectives, characters and narrators	<ul style="list-style-type: none"> Watch this <u>Slideshow</u> and think/pair/share on the value(s) of different types of narrators.
How specific words contribute to the overall meaning and impact of the work	<ul style="list-style-type: none"> Analyze word choice in <i>Gatsby</i> Explore figurative language and diction and its impact on the work <ul style="list-style-type: none"> <u>GG Diction in Gatsby</u> <u>CH 8 Diction Comparison</u> <u>Diction Word Choice Practice</u> <u>03 Figurative Language GG Ch. 3</u>
The concept of the American Dream	<ul style="list-style-type: none"> Read and discuss the concept of the American Dream <ul style="list-style-type: none"> <u>01 American Dream Handout</u>

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	<ul style="list-style-type: none"> ○ <u>01 American Dream Brainstorming</u> ○ <u>01 American Dream Videos</u> ○ <u>01 Elements of the American Dream</u>
How to analyze the text (including selecting quotations and student generated inquiry)	<ul style="list-style-type: none"> ● Read <i>The Great Gatsby</i>, discuss and respond to various sections <ul style="list-style-type: none"> ○ <u>Chapter by chapter reader responses (using critical reading, teacher generated questions, and student generated inquiry)</u> ○ <u>Chapter 3 Questions</u> (with a focus on truth, lies, rumors, and assumptions) ○ <u>01 Gatsby Mosaic 2024</u> ○ <u>01 Mosaic Gatsby Blank</u>

Revision History

Revision Date	Explanation of change(s) made to document

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Grade/Subject	English II Grade 10
Unit Title	<i>The Journey Doesn't End Here: Talking about Literature</i>
Overview of Unit	Students will reflect on the literature they have studied throughout the year and subsequently read several contemporary essays and articles about the value of the humanities. In a two-hour class graded discussion, students will synthesize the meaning of the new readings with their understanding of the year's readings. Student reflection about how and why the study of literature is critical to human development and human's understanding of ourselves and others shapes this unit. This reflection and whole-class student-led discussion will broaden students' understanding of the importance of the humanities (with specific focus on the value of literature), prompt self-reflection, and foster a deeper understanding of both literature and their worlds.
Pacing	3-4 weeks

Background Information For The Teacher (Unit Overview)

Rationale: The study of literature holds immense value for students as it provides a unique gateway to understanding the historical, cultural, artistic, and philosophical dimensions of our nation's past. In a world increasingly dominated by science and technology, the importance of a Humanities-based education cannot be overstated. While science and technology offer solutions to practical problems, the Humanities provide the tools for navigating the complexities of human relationships, ethics, and societal challenges. This unit aims to illustrate the significance of studying American literature and how it plays a transformative role in shaping students' understanding of themselves, their society, and the broader human experience. By immersing themselves in the literary tapestry of American writings, history, culture, art, and philosophy, students not only gain a profound understanding of their nation's past, but also develop the critical skills and cultural awareness necessary for navigating the challenges of the future. It is essential to assess not only students' understanding of that literature, but also their ability to engage with the material through oral

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communication. Oral communication is a vital skill for success in academic, professional, and personal contexts. Incorporating it into the assessment reflects the real-world application of literature analysis and discussion.

Key Learning/Big Ideas:

- analyze the underlying messages within texts
- enhance critical thinking and comprehension
- discern layers of meaning in various texts
- foster an appreciation for the dynamic nature of storytelling (relevant to film, literature, human interaction.)
- develop empathy (important for interpersonal relationships and professional settings where the ability to navigate complex personalities is crucial.)

Essential Questions

Essential Questions

- What is the value of a Humanities-based education?
- How can the study of fiction make us more empathetic?
- How can people become more effective communicators?

Core Content Standards

Content Specific Standards (NGSS, SS Framework, CCS, etc.)

- SL.9-10.1a. Come to discussions prepared, having read and researched material under study; explicitly draw on that preparation by referring to evidence from texts and other research on the topic or issue to stimulate a thoughtful, well-reasoned exchange of ideas.

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	<ul style="list-style-type: none"> ● SL.9-10.1b. Work with peers to set rules for collegial discussions and decision-making (e.g., informal consensus, taking votes on key issues, presentation of alternate views), clear goals and deadlines, and individual roles as needed. ● SL.9-10.1c. Propel conversations by posing and responding to questions that relate the current discussion to broader themes or larger ideas; actively incorporate others into the discussion; and clarify, verify, or challenge ideas and conclusions. ● SL.9-10.1d. Respond thoughtfully to diverse perspectives, summarize points of agreement and disagreement, and, when warranted, qualify or justify their own views and understanding and make new connections in light of the evidence and reasoning presented. ● SL.9-10.1. Initiate and participate effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on grades 9–10 topics, texts, and issues, building on others’ ideas and expressing their own clearly and persuasively. ● RI.9-10.1. Cite strong and thorough textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text. ● RI.9-10.3. Analyze how the author unfolds an analysis or series of ideas or events, including the order in which the points are made, how they are introduced and developed, and the connections that are drawn between them. ● RI.9-10.7. Analyze various accounts of a subject told in different mediums, determining which details are emphasized in each account.
Portrait of the Graduate Characteristics	<ul style="list-style-type: none"> ● Collaborator ● Communicator ● Empathizer ● Problem Solver ● Planner
CELP Standards	

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- Construct meaning from oral presentations and literary and informational text through grade-appropriate listening, reading, and viewing
- Participate in grade-appropriate oral and written exchanges of information, ideas, and analyses, responding to peer, audience, or reader comments and questions
- Speak and write about grade-appropriate complex literary and informational texts and topics
- Construct grade-appropriate oral and written claims and support them with reasoning and evidence
- Conduct research and evaluate and communicate findings to answer questions or solve problems
- Analyze and critique the arguments of others orally and in writing
- Adapt language choices to purpose, task, and audience when speaking and writing
- Determine the meaning of words and phrases in oral presentations and literary and informational text
- Create clear and coherent grade-appropriate speech and text
- Make accurate use of standard English to communicate in grade appropriate speech and writing

K-U-D

UNDERSTANDS

Students will understand that:

- The study of the humanities often emphasizes critical analysis, interpretation, and evaluation of information, and fosters well-rounded individuals capable of navigating the complexities of the modern world.

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- Fiction often presents characters with moral dilemmas and exploration of these moral dilemmas offers an opportunity for an increased capacity for empathy in real-world situations, and a greater understanding of the human experience.
- Good communication includes both speaking and listening.
- In order to share and convey ideas effectively, students must hone their skills as synthesizers, speakers, listeners, empathizers, collaborators, planners, and problem solvers.
- People need to prepare for formal discussions in order to have an effective exchange of ideas

KNOW

*Key Facts, formulas, information, vocabulary
Can be words, phrases, or sentences*

- Definitions of
 - the humanities
 - a good communicator
 - empathy
- The value of the humanities
- Elements of good speaking and listening
 - body language
 - eye contact
 - voice modulation
 - tone
 - audience

DO

*Skills of the discipline
Can be sub-skills from a standard*

- Read, decode and understand a set of texts of varying complexity
- Analyze how an author unfolds an analysis or series of ideas
- Speak and listen to their peers effectively
 - Understand the importance of body language, voice modulation, eye contact, attention to audience, tone
- Synthesize texts to come up with conclusions about the importance of literature
- Support and advance ideas using evidence from a text
 - Use reasoning to support ideas

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Common Student Misconceptions for this Unit

Students might mistakenly believe:

- That the ideas from literature are discrete ideas
- That the humanities “don’t matter” or are unimportant.
- That most professions do not use the humanities in everyday operations.
- That good discussion just means “talking a lot.”
- That people don’t need to prepare for a discussion/conversation.
- That valuing the humanities means devaluing STEM.

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Unit Assessment

Performance Assessment

*(Performance Task = "An Inquiry")

Task Overview:

The task for students is to prepare for a graded discussion on the importance of the humanities. This will use what they have read and learned from the course of the whole year, as well as having them read supplementary articles on this subject to prepare for the discussion.

OVERARCHING QUESTION:

- How has the study of history, literature, writing, art, philosophy, and music (the humanities) helped society in the past and how does it help society in the present? How are the humanities essential for living and being a human in a world increasingly dominated by science and technology?

Task: The task is to read (and watch) a variety of texts that pertain to the above prompt. Then, you will participate in reflective writing. All of this is in preparation for a graded discussion during your exam period.

Student Directions: An incoming 10th grader asks you what you've done all year in English class. What *would* you say to people who ask why we have spent so much time reading and talking about American literature? Why is

Other (Formative, quizzes, tests, etc.)

- Viewing Guide for "Wired for Story"
- Presentation Skills - Preparation / Logos, Ethos, and Pathos, etc.
 - Ted Talk Peer Eval
 - TED Talk Planning Sheet BRIGHT
 - Logos, Ethos, and Pathos

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the study of literature and the humanities essential for living and being human in a world increasingly dominated by science and technology?

[Link to Final Exam Discussion Assignment](#)

Supplemental Materials and Resources

Texts

Required Texts

Title	Author	Rationale	Lexile Level (where applicable)
<u>"Wired for Story" TED Talk Video</u>	Lisa Cron	To learn about our world, other people and ourselves, we must delve deeply into stories: As Lisa Cron said in this TED talk, "I decided to learn	N/A

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		<p>so I started listening to other people's stories and what I discovered was I wasn't the only one whose behavior whose entire worldview was shaped by the stories I heard. . . “</p> <p>“We don't turn to Story to escape reality, we turn to Story to navigate reality.”</p>	
Suggested Texts			
<u>A Top Medical School Revamps Requirements To Lure English Majors</u>	Interview with multiple people	The interview focuses on the importance of a humanities / liberal arts education in creating a “well-rounded” medical student / doctor. It focuses on the benefits of having people who can look at the same problem through different lenses.	N/A
<u>To Write Better Code, Read Virginia Woolf</u>	J. Bradford Hipps	The article focuses on differences in the way a humanities major might see code vs someone with a strict engineering background. It highlights how someone with a music or philosophy background might have an advantage / unique perspective.	N/A
<u>David Foster Wallace: Kenyon Commencement Address 2005</u>	David Foster Wallace	The speech focuses on a liberal arts education helping students to master an awareness of their own thought process and allowing them to decide what is significant and deserves focus. “The really important kind of freedom involves attention and awareness and discipline, and being able truly to care about other people and	N/A

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		to sacrifice for them over and over in myriad petty, unsexy ways every day.”	
<u>Why economists need to expand their knowledge to include the humanities</u>	Gary Saul Morson and Morton Schapiro	The article references the results of a study that found only 42 % of economists thought it was necessary to “understand the world through a cross-disciplinary lens.” It points out that “...economists have a hard time in at least three areas: accounting for culture, using narrative explanation, and addressing ethical issues that cannot be reduced to economic categories alone.”	N/A
<u>Why critics are wrong about liberal arts degrees</u>	Wilson Peden	This article delves into the idea that a humanities degree is not “useless,” but instead fosters skill development and equitable employment opportunities. “All of which is to say, we need people studying the humanities, just like we need people studying every other discipline.”	N/A
<u>Aristotle’s Wrongful Death</u>	Frank Bruni, <i>New York Times</i>	This article speaks to how colleges “shouldn’t downgrade the nonvocational mission of higher education: to cultivate minds, prepare young adults for enlightened citizenship, give them a better sense of their perch in history and connect them to traditions that transcend the moment.”	N/A
<u>Report Argues US Is</u>	Interview with multiple people	This interview develops a conversation on how	N/A

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<u>Neglecting, Undervaluing Education in the Humanities</u>		it is not a competition between STEM and the humanities, but rather that one should not be neglected in favor of the other. This creates a fuller approach to education.	
<u>Literature Helps Young Minds Relate to Real World Conflicts</u>	J. Patrick Black	This article delves into the idea of literature encouraging empathy, and that it offers “a context for processing” real world conflicts like war. The author says, “I can still hope that when they watch or hear or read stories about people enduring the real thing, they’ll feel a connection, however basic, and think, “This is happening to someone real, someone like me.”	N/A
<u>Should Literature Be Useful?</u>	Lee Siegel	This article delves into the complexity of empathy, its role in literature as well as how it is reflected in our lives. Fiction has been shown to enhance empathy in individuals and its true strength comes in alleviating the rigidity of fact and allowing readers' imaginations to transcend.	N/A
<u>This is How Literary Fiction Teaches Us to Be Human</u>	Tom Blunt	This article expresses that life-long readers are likely more familiar with the empathy enhancing aspects through specific content consumed. Literacy is crucial for societal functioning and to instill a deep appreciation for human life despite the resistance from new media.	N/A

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<u>As Humanities Majors Decline, Colleges Try to Hype Up Their Programs</u>	Jae C. Hong	Humanity majors are declining at a rapid rate. This article defends the major by explaining the importance of the humanities and that every student can “think critically, read carefully and listen empathetically.”	N/A
<u>How to Save a Sad, Lonely, Angry and Mean Society</u>	David Brooks, <i>New York Times</i>	This article discusses how “we have become so sad, lonely, angry and mean as a society in part because so many people have not been taught or don’t bother practicing to enter sympathetically into the minds of their fellow human beings.” The hard and social sciences help us understand patterns and the world, but “culture and the liberal arts help us enter the subjective experience of particular people: how this unique individual felt; how this other one longed and suffered.”	N/A
<u>The surprising thing Google learned about its employees — and what it means for today’s students</u>	Valerie Strauss	The article documents and discusses a reversing trend that reestablishes the value of “soft skills,” which are humanities-derived, over “hard skills,” which are STEM-derived, in the modern workplace.	N/A
<u>The Humanities Are in Crisis</u>	Mike Segar	There has been a steep decline in humanities-based majors because of a misperception of their practical value, especially in regard to employment.	N/A
<u>Novel Finding: Reading Literary Fiction</u>	Julianne Chiaet	Reading literary fiction has a valuable socializing influence because it increases the reader’s	N/A

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<u>Improves Empathy</u>		capacity for empathy. This should help to inform, among other things, academic curriculum development.	
<u>Reading Fiction Really Will Make You Nicer and More Empathetic, New Study Says</u>	Jessica Stillman	A metastudy analysis reveals that reading fiction enhances social cognition and expands the capacity for empathy.	N/A
<u>The Humanist Vocation</u>	David Brooks, <i>New York Times</i>	This article goes into how the humanist's job was delve into the inner workings of a person and their morals, "imposing intellectual order upon it, educating the emotions with art" and that many in the humanities have lost sight of this in favor of categorizing literature, being too tentative with discussion and analysis for fear of offending people.	N/A
<u>Reading Literature Makes Us Smarter and Nicer</u>	Annie Murphy Paul	This article is a defense of "deep reading" (reading that is "slow, immersive, rich in sensory detail and emotional and moral complexity") and offers information from formal studies that supports its argument.	N/A
<u>Teaching Mark Twain's Adventures of Huckleberry Finn</u>	Shelley Fisher Fishkin	The article delves into the value of <i>AoHF</i> to illustrate that humanities-derived understandings are timeless and valuable.	N/A

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<i>Adventures of Huckleberry Finn</i>	Mark Twain	The novel delves into an Antebellum white adolescent's journey as he comes to terms with race and the individual's role in society.	980L
<i>James</i>	Percival Everett	Percival Everett's 2024 novel offers a profound and innovative reimagining of Mark Twain's <i>Adventures of Huckleberry Finn</i> , one that challenges traditional narratives about slavery and race in 19th-century America, encouraging students to critically examine historical representations and understand the complexity of racial experiences.	Currently unavailable

Learning Plan	
Required Learning Activities	
<i>In order to:</i>	Students will:
Learn speaking and listening skills	<ul style="list-style-type: none"> ● Mini lesson on speaking and listening skills ● Modeling good speaking/presentation/listening skills ● Practice discussions in small group and whole class settings <ul style="list-style-type: none"> ○ Practice Discussion Ideas Document
Select and prepare support to advance ideas in a whole class discussion	<ul style="list-style-type: none"> ● Watch “Wired for Story” TED talk and work to select strong evidence to prepare for verbal discussion of the value of storytelling/the humanities <ul style="list-style-type: none"> ○ Annotating Lesson ● Read teacher articles (selected from suggested readings by teacher and/or students) and

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	annotate/take notes on how the articles support the value of the humanities
Suggested Learning Activities	
<i>In order to:</i>	Students will:
Reflect on the value of the activities and literature read this year.	<p>Write reflection responses</p> <p><u>Sample Reflective Assignment for a Level H Class</u></p> <p><u>Sample Reflective Assignment for a Level 1 Class</u></p> <p><u>Sample Reflective Assignment for a Level 2 Class</u></p> <p><u>Sample Reflective Assignment for a Level 3 Class</u></p>

Revision History	
Revision Date	Explanation of change(s) made to document

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Grade/Subject:	Grade 11 English
Unit Title:	What's the Big Idea? Exploring the Role of Multiple Complex Themes in Literature
Overview of Unit	Students will investigate how literary devices create multiple themes in a novel, making connections between those themes and our course essential questions. They will write and defend a claim that explores how two or more themes interact and build on one another in a piece of literature.
Pacing	Quarter 1

Background Information For The Teacher (Unit Overview)

Rationale:

In this unit students will work to identify multiple themes/big ideas in literature and investigate how they translate into universal real world concerns. Ideas such as power, morality, freedom, and truth will be introduced and interrogated. Studying these concepts will allow students to identify and consider meaningful text-to-self connections. These four main ideas will be the foundation of our thematic studies and reading, writing, and thinking discussions throughout English III. Students will explore how certain literary elements work to reveal themes and to shape meaning.

Students will be able to structure and support a claim that explores how two or more themes interact and build on one another in a piece of literature, mirroring the complexity of the arguments they'll create and situations they'll encounter in the real world. Students will also consider the ways in which literary themes apply to their own lives and the world around them.

Key Learning/Big Ideas:

- Literary elements such as symbol, characterization, setting, imagery help to communicate theme.
- How to effectively articulate a theme in a claim statement.
- How to effectively support a claim with evidence from the text.
- One piece of literature can have more than one theme.

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- Multiple themes intersect with one another in order to deepen the complexity of a piece of literature.

Essential Questions

Essential Questions

- What is the nature of truth?
- Are human beings inherently good or evil?
- What governs a person's actions?
- What is the nature of power?

Core Content Standards

Content Specific Standards (NGSS, SS Framework, CCS, etc.)

RL.11-12.1. Cite strong and thorough textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text, including determining where the text leaves matters uncertain

RL.11-12.2. Determine two or more themes or central ideas of a text and analyze their development over the course of the text, including how they interact and build on one another to produce a complex account; provide an objective summary of the text.

RL.11-12.3. Analyze the impact of the author's choices regarding how to develop and relate elements of a story or drama (e.g., where a story is set, how the action is ordered, how the characters are introduced and developed)

RL.11-12.5. Analyze how an author's choices concerning how to structure specific parts of a text (e.g., the choice of where to begin or end a story, the choice to provide a comedic or tragic resolution) contribute to its overall structure and meaning as well as its aesthetic impact.

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W.11-12.1 & 1a. Write arguments to support claims in an analysis of substantive topics or texts, using valid reasoning and relevant and sufficient evidence. a. Introduce precise, knowledgeable claim(s), establish the significance of the claim(s), distinguish the claim(s) from alternate or opposing claims, and create an organization that logically sequences claim(s), counterclaims, reasons, and evidence.

W.11-12.4. Production/Distribution of Writing 4. Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience. (Grade-specific expectations for writing types are defined in standards 1–3 above.)

W.11-12.5. Develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience. (Editing for conventions should demonstrate command of Language standards 1–3 up to and including grades 11–12 on page 55.)

W.11-12. .6. Use technology, including the Internet, to produce, publish, and update individual or shared writing products in response to ongoing feedback, including new arguments or information.

CCSS.ELA-LITERACY.SL.1112.1.C

Propel conversations by posing and responding to questions that probe reasoning and evidence; ensure a hearing for a full range of positions on a topic or issue; clarify, verify, or challenge ideas and conclusions; and promote divergent and creative perspectives.

Portrait of the Graduate Characteristics

- Collaborator
- Communicator
- Empathizer
- Problem Solver
- Planner

CELP Standards

- Construct meaning from oral presentations and literary and informational text through grade-appropriate listening, reading, and viewing
- Participate in grade-appropriate oral and written exchanges of information, ideas, and analyses, responding to peer, audience, or reader comments and questions

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- **Speak and write about grade-appropriate complex literary and informational texts and topics**
- Construct grade-appropriate oral and written claims and support them with reasoning and evidence
- Conduct research and evaluate and communicate findings to answer questions or solve problems
- Analyze and critique the arguments of others orally and in writing
- Adapt language choices to purpose, task, and audience when speaking and writing
- Determine the meaning of words and phrases in oral presentations and literary and informational text
- Create clear and coherent grade-appropriate speech and text
- **Make accurate use of standard English to communicate in grade appropriate speech and writing**

K-U-D

UNDERSTANDS

Students will understand that:

- Authors reveal multiple themes through a number of literary elements working together.
- Themes are universal truths about life and people that the text reveals; they are not one word.
- While some ideas are stated explicitly by an author, others are left purposely ambiguous

KNOW

- Claim/Thesis
- theme
- plot
- symbol
- motif
- imagery
- irony
- conflict
- characterization

DO

- support a claim with evidence from the text
- articulate a theme from a text
- analyze how symbols help to reveal theme
- analyze how figurative language help to reveal theme
- analyze how characterization helps to reveal theme
- write a literary argument to propose and defend a theme using accurate literary elements:
 - Investigate and construct a claim

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- ambiguity
- evidence
- direct quotations vs. paraphrase
- summary vs. analysis
- elements of effective speaking and listening

- Gather evidence from primary source in order to support claim
- Organize ideas into effective paragraphs that include: topic sentence, evidence (details, examples, quotations), and analysis of evidence
- revise writing to reflect appropriate organization, style, and conventions of standard English
- prepare for and participate in a class debate

Common Student Misconceptions for this Unit

Students might mistakenly believe:

- A theme can be a single word.
- Plot and meaning are the same thing.
- Books from other time periods or with characters from other cultures are not relevant today.
- Books can be understood with a cursory read.
- Ambiguity is a flaw in the literature or represents the author's desire to have the reader "make up their own opinion" rather than representing life's complexities.

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Unit Assessment

Performance Assessment

*(Performance Task = "An Inquiry")

Task Overview: (directions for teachers, including what the task is, how it's authentic, how it might be differentiated, materials, etc.)

Students will investigate, in the pages of an essay, how multiple themes intersect in a single work of literature.

Life's Essential Questions: A Thematic Exploration

Final draft: Lord of the Flies Thematic Exploration

Other


- Introduction to Essential Questions Activity

What Makes Us Human?

"How Reading Makes Us More Human" (abridged) (good for L3)


Supplemental Materials and Resources

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-  Copy of 2023 ESSENTIAL QUESTIONS IN LOTF

<https://www.cambridge.org/us/education/blog/2019/07/07/37-activities-teaching-lord-flies/>

Golding's Quote at the end of the novel

Texts		
Required Texts		
Title	Author	Lexile Level (where applicable)
<i>Lord of the Flies</i>	William Golding	770L
Suggested Texts		
<u>Text Title</u>	<u>Author</u>	<u>Genre</u>
2016 novel <i>Homegoing</i>	Yaa Gyasi	910L Historical Fiction
 Lord of the Flies (1963 uncut original) time stamps	director: Peter Brooks	film adaptation of novel
<u>"We Wear the Mask"</u>	Paul Laurence Dunbar	Poem
<u>"I stood upon a high place"</u>	Stephen Crane	Poem
<u><i>The Stanford Prison Experiment</i></u>	Kyle Patrick Alvarez, dir. Tim Talbott, writer	Documentary

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<u>"The Real Lord of the Flies" and Film Excerpt</u>	Rutget Bregman	Nonfiction narrative (excerpt) and short film
<u>"The Terror"</u>	Junot Diaz (in CommonLit)	Essay (memoir)
<u>"Ten boys vs ten girls were left unsupervised in house for a week and the results are absolute chaos"</u>	Daisy Phillipson	Documentary
<u>"The 1972 Andes Flight Disaster"</u>	CommonLit Staff	Nonfiction
<u>"Picture of Childhood" (often used on midterm exam)</u>	Yevgeny Yevtushenko	Poetry
<u>"'Yellowjackets' Leans In To Savagery"</u>	Alexis Solosky	Nonfiction (television review)
<u>The Wilds</u>	Susana Fogel et al.	Television series
 <u>Time Flies 1996 (Lord Of The Flies '1963' Reunion) Full Leng...</u>		documentary film
<u>"Testimonial"</u>	Edwidge Danticat	Short Story

Learning Plan

Required Learning Activities

In Order to Learn :

Students will:

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<ul style="list-style-type: none"> how to cite strong and thorough textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text, including determining where the text leaves matters uncertain 	<ul style="list-style-type: none"> respond to reading questions complete graphic organizers to develop and support interpretations of the text <p>suggested organizers:</p> <p>Evidence Tracker and essential question tracker.docx</p> <ul style="list-style-type: none"> Theme Development Group Work Task: Thematic Statements about Lord of the Flies
<ul style="list-style-type: none"> how to evaluate evidence 	<ul style="list-style-type: none"> review passage studies
<ul style="list-style-type: none"> Theme, symbolism, imagery, irony (additional literary elements), claim, thesis 	<ul style="list-style-type: none"> Write a thematic essay. (at end of book) SYMBOLS IN LORD OF THE FLIES theme tips
<ul style="list-style-type: none"> the complex role ambiguity has in the functionality of a work of literature 	<ul style="list-style-type: none"> Examine how the ambiguity of the beast and Simon's death contribute to the complexity of the novel LOTF Chapter 5: The Beastie...What Is It?! Debate the nature of Simon's death: Was it an accident or was it murder?: 2022 Simon's Death Debate
Suggested Learning Activities	
<i>In Order to Learn :</i>	<i>Students will:</i>
Motif, evidence selection, literary analysis, symbolism	<ul style="list-style-type: none"> identify a phrase from Junot Diaz's "The Terror" that has a clear connection to our whole-class text and draw a convincing parallel that delivers a shared theme (e.g. "I was already deep in the vulnerability matrix," etc.) Draw inferences based on textual evidence: LOTF Chapter 5: The Beastie...What Is It?! Analyze and interpret reading passages using: Passage Studies - respond to suggested excerpts and prompts, focusing on specific literary elements in each passage and linking it to developing themes

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	<p>in the novel</p> <ul style="list-style-type: none"> Explore concept of symbolism through <ul style="list-style-type: none"> The Magic Conch in 5 Minutes! "Club SpongeBob" 5 Minute Episode SpongeBob (start this clip at the 1:27 mark)
Authors reveal theme through a number of literary elements working together. (collaborator/problem solver)	<ul style="list-style-type: none"> Draw and articulate connections between and among narrative elements: <ul style="list-style-type: none"> Hexagonal thinking for Lord of the Flies (40 pts) Articulate the role of ambiguity in a work of literature: <ul style="list-style-type: none"> Copy of Ch. 9: A View to a Death questions <p><u>LOTF: Unmasking the Essential Questions</u> (about mid-way through the book)</p>
Empathizer/Communicator/Collaborator/Problem Solver/	<ul style="list-style-type: none"> Lord of the Flies NASA Prereading Activity - students work separately and then collaborate as a group on a mock survival activity, then processing the group dynamics that led to or prevented their success Building a Community: Class Rules - brainstorm and discuss what rules are needed for a well-functioning society, then develop a set of rules for their classroom community, as a prelude to chapter 2 of the novel, where the boys create rules for their island community. Lord of the Flies: Opening Scene - analyze the sounds and visuals of the opening montage of the 1963 Peter Brooks' film of LOTF to get some context and background for the start of the novel, using clues to make inferences. Comparing and contrasting adaptations of Lord of the Flies <ul style="list-style-type: none"> Trapped on an Island Activity "The 1972 Andes Flight Disaster" The Stanford Prison Experiment
Integrating evidence	<p>EBC in LOTF first three chapters.docx</p> <p>LOTF Quotation Integration</p>

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Revision History (after approval)

Revision Date	Explanation of change(s) made to document

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Grade/Subject	Grade 11, English III
Unit Title	Unit 2: Text, Self, and World: How Speculative Fiction Teaches Us About Our World
Overview of Unit	Students will read and analyze work(s) of speculative fiction and compare those works to contemporary issues. The unit will culminate with students researching contemporary issues and writing an argument essay.
Pacing	2nd marking period (8-10 weeks)

Background Information For The Teacher (Unit Overview)

Rationale:

Speculative fiction encourages creative and critical thinking by presenting imaginative worlds, futuristic technologies, and fantastical creatures. It frequently serves as a lens through which authors explore contemporary social, political, and ethical issues. Studying speculative fiction in 11th grade offers many benefits, fostering critical thinking through the exploration of complex hypothetical scenarios and contemporary issues like social justice and technological advancement. These narratives stimulate students' creativity and encourage them to think beyond conventional boundaries while reading a genre of high interest. Engaging with imaginative worlds and diverse characters enhances creativity, empathy, and perspective-taking, while also encouraging students to reflect on their own identities and places in the world.

Through the analysis of literary themes and devices, students deepen their appreciation for storytelling as a tool for understanding the complexities of the human experience, developing an awareness of important contemporary issues, such as climate change, technological advancements, social justice, and the consequences of unchecked power. Students will use skills from this unit to develop and articulate their own argument about a topic or world issue that matters most to them. By engaging with speculative fiction, students can develop a deeper understanding of themselves, the world around them, and the power of storytelling to illuminate the human experience. (written in collaboration with ChatGPT)

Key Learning/Big Ideas:

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- Imaginary worlds represented in fiction mirror concerns in the real world.
- Using well-chosen sources allows writers to construct a more effective argument.
- Effective presenters carefully choose their words, connect ideas clearly, and use emphasis appropriately to engage their audience.
- Effective listeners follow a line of reasoning, evaluating alternative perspectives.
- There are both benefits and dangers to the use of technology.

Essential Questions

Essential Questions

- What is the nature of truth?
- Are human beings inherently good or evil?
- What governs a person's actions?
- What is the nature of power?

Core Content Standards

Content Specific Standards (NGSS, SS Framework, CCS, etc.)

R.11-12.1. Cite strong and thorough textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text, including determining where the text leaves matters uncertain.

W.11-12.1a. Introduce precise, knowledgeable claim(s), establish the significance of the claim(s), distinguish the claim(s) from alternate or opposing claims, and create an organization that logically sequences claim(s), counterclaims, reasons, and evidence.

W.11-12.1. Write arguments to support claims in an analysis of substantive topics or texts, using valid reasoning and relevant and sufficient evidence.

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	<p>W.11-12.9. Draw evidence from literary or informational texts to support analysis, reflection, and research.</p> <p>11-12.SL.4 Present information, findings, and supporting evidence, conveying a clear and distinct perspective, such that listeners can follow the line of reasoning, alternative or opposing perspectives are addressed, and the organization, development, substance, and style are appropriate to purpose, audience, and a range or formal and informal tasks.</p>
<p>Portrait of the Graduate Characteristics</p>	<ul style="list-style-type: none"> ● Collaborator ● Communicator ● Empathizer ● Problem Solver ● Planner
<p>CELP Standards</p>	<ul style="list-style-type: none"> ● Construct meaning from oral presentations and literary and informational text through grade-appropriate listening, reading, and viewing ● Participate in grade-appropriate oral and written exchanges of information, ideas, and analyses, responding to peer, audience, or reader comments and questions ● Speak and write about grade-appropriate complex literary and informational texts and topics ● Construct grade-appropriate oral and written claims and support them with reasoning and evidence ● Conduct research and evaluate and communicate findings to answer questions or solve problems ● Analyze and critique the arguments of others orally and in writing ● Adapt language choices to purpose, task, and audience when speaking and writing ● Determine the meaning of words and phrases in oral presentations and literary and informational text ● Create clear and coherent grade-appropriate speech and text ● Make accurate use of standard English to communicate in grade appropriate speech and writing

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K-U-D

UNDERSTANDS

Students will understand that:

- Speculative fiction can teach us about the modern world, making us aware of contemporary issues.
- Writers of speculative fiction often conduct extensive research, using issues of the contemporary world as a springboard.
- Speculative fiction often contains complex themes and lessons about human nature and the world around them.
- Effective presenters make careful rhetorical choices, plan, and practice.
- Solid arguments are crafted by thorough research, evidence, and the use of rhetorical appeals.

KNOW

- speculative fiction (dystopia, utopia, science fiction, post-apocalyptic)
- theme
- paradox
- ethos, pathos, logos
- the kinds of databases available to them
- characteristics of an effective presentation

DO

- Identify issues in the text that parallel or draw on contemporary issues
- Use relevant and sufficient evidence to support interpretations and analyses
- Collaborate with Artificial Intelligence to produce a list of compelling questions on a contemporary issue
- Compose a claim addressing one or more compelling questions on a contemporary issue
- Research a contemporary issue, finding evidence to support their claim
- Plan and present a contemporary issue and its connection to a text
- Plan, organize, and draft an argumentative essay
- Access and use Amity's databases (SIRS, ProQuest)
- Evaluate presentations for rhetorical devices and thoroughness

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- Present information and design according to audience and purpose

Common Student Misconceptions for this Unit

Students might mistakenly believe:

- Dystopias and science fiction texts cannot teach us about the modern world.
- Writers of speculative fiction just “make stuff up.”
- Speculative fiction is simply a popular form of entertainment with little thematic substance.
- Reading presentation slides to an audience is an effective way to present material.
- Listening is a passive activity.
- You can trust any source online.
- AI can do my work for me.

Unit Assessment

Performance Assessment

Task Overview: (directions for teachers, including what the task is, how it’s authentic, how it might be differentiated, materials, etc.)

Other

- graphic organizers to record notes and develop questions based on oral presentations delivered by classmates

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These tasks require students to use speculative fiction as a gateway to examine real world issues, and especially the issues that matter to them. Students will examine real world issues in conjunction with our essential questions in order to identify an issue, make a presentation, and develop an argumentative piece of writing. Students will have the choice of an in-class presentation or creating a Tik-Tok-style video to inform the class about their current event. Students will be able to choose a current, real-world issue on which to develop an argumentative essay. Through a series of writing workshops, students will strengthen their ability to communicate effectively and persuasively.

Student Directions:

- ☐ Summative Assessment #1: Current Events Presentation
- ☐ Summative Assignment #2: Argument Essay


- pre-writing planners for presentation and for argument essay (to be completed)
- peer review workshop for argument essay (to be completed)

Supplemental Materials and Resources

- [The Hermit Kingdom | VICE on HBO](#) - about North Korea
- [National Geographic Inside Undercover in North Korea - video Dailymotion](#) National Geographic Inside Undercover in North Korea

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- Dystopian music: https://en.wikipedia.org/wiki/List_of_dystopian_music
- [In the Year 2525](#)
- The World is Too Much with Us <https://www.scottishpoetrylibrary.org.uk/poem/peace-wild-things-0/>
- [Peace of Wild Things](#)
- [Black Mirror "Nosedive"](#)
- [The Twilight Zone "The Obsolete Man" viewing guide](#)
- <https://www.allsides.com/unbiased-balanced-news>
- https://uscupstate.libguides.com/news_aware/Propaganda
- <http://www.livingroomcandidate.org/>
- <https://www.theguardian.com/global-development/2018/oct/12/phone-misery-children-congo-cobalt-mines-drc> Omelas Connection
- [!\[\]\(467d80e979964f7f8c752fb22248b5b7_img.jpg\) There will come soft rains](#) (ANIMATED ADAPTATION)
- <https://poets.org/poem/there-will-come-soft-rains> (Sara Teasdale poem)







Texts			
Required Texts			
Title	Author	Rationale	Lexile Level (where applicable)
 The world of Sc...	Neal Shusterman	Shusterman explains his writing and research process for the <i>Scythe</i> trilogy. The interview reiterates the importance of carefully researching topics as well as the ways stories mirror contemporary concerns.	n/a

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<u>"The Ones Who Walk Away From Omelas"</u> by Ursula K LeGuin - from The Wind's Twelve Quarters With a clamor of bells that set th	Ursula LeGuin	Omelas is a great story to introduce students to complex scenarios and deep philosophical issues. This story generates conversations among students about what matters to them, and, ultimately, will help prepare them for defending an argument of their own.	
Suggested Texts			
<u>The Subliminal Man </u> <u>READERS LIBRARY</u>	JG Ballard	themes of consumerism, technological/corporate control through media	
<u>There Will Come Soft Rains</u>	Ray Bradbury	themes of technological control, effects of war on humanity	
<u>Parable of the Sower</u> <u>Excerpt of novel</u>	Octavia Butler	This novel, written in 1993, explores the effects of climate change in a "future" 2024.	
<u>"The Lottery," by</u> <u>Shirley Jackson The</u> <u>New Yorker</u>	Shirley Jackson	This short story explores the themes of blindly following tradition and the harmful effects of conformity.	
<i>1984</i>	George Orwell	A cautionary novel about the dangers of technology, propaganda, and totalitarianism	
<i>Brave New World</i>	Aldous Huxley	A futuristic novel warning about the intersections between social class and science,	

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		censorship and propaganda	
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Learning Plan	
Required Learning Activities	
In Order to Learn :	Students will:
Review dystopian characteristics and consider how the genre is a reflection of problems in our current world	<ul style="list-style-type: none"> • identify conflicts in trailers of dystopian films • develop a tentative definition of dystopia based on prior knowledge •  Dystopia+PowerPoint (1).pptx •  Dystopia Intro •  DefinitionCharacteristics
Identify elements of speculative fiction	<ul style="list-style-type: none"> • read and analyze Ursula LeGuin's story "The Ones Who Walk Away from Omelas" • preview words that may be unfamiliar to students using • locate and discuss tensions in the text that may foreshadow the story's end <p><u>Vocabulary from Omelas</u></p> <p><u>Audiobook of The Ones Who Walk Away from Omelas</u></p> <ul style="list-style-type: none"> •  The Ones Who Walk Away From Omelas questions •  Jenga for Omelas •  "THE ONES WHO WALK AWAY FROM OMELAS" -QUIZ
To demonstrate the characteristics of an effective presentation	<ul style="list-style-type: none"> • Review characteristics of an effective presentation by analyzing two Ted Talks: <ul style="list-style-type: none"> ○ Tristan Harris: <u>How Tech Companies Control Us</u> ○ Student Example: <u>https://www.ted.com/talks/kelly_zhu_dystopia_is_real?subtitle=en</u> ○ Additional examples, if needed <u>https://www.ted.com/playlists/310/artificial_intelligence</u>

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	<ul style="list-style-type: none"> ○ <u>Presentation notes document</u> ● prepare and present their own presentations ● students will listen to their peers and offer constructive feedback <u>Oral Presentations</u>
To develop and communicate a call to action on a contemporary issue	<div> <div></div> Summative Assignment #2: Argument Essay </div> <ul style="list-style-type: none"> ● research and select a contemporary topic that warrants attention using at least two credible sources ● use generative AI to identify and investigate key issues and questions about selected current event to help guide research and connect to speculative fiction
To develop and communicate a call to action on a contemporary issue	<ul style="list-style-type: none"> ● compose a rough draft, drawing upon rhetorical appeals and research, addressing the counterargument and an essential question
To develop and communicate a call to action on a contemporary issue	<ul style="list-style-type: none"> ● revise their thesis-driven argument through peer editing and conferencing with the teacher
Understanding databases with our school media specialists	Students will become familiar with our library database through a series of learning workshops with our media specialists; they will develop an awareness of research skills. These skills will be important as students begin to develop their argumentative piece.
Suggested Learning Activities	
<i>In Order to Learn :</i>	<i>Students will:</i>
Strategies for Writing an Argument	<ul style="list-style-type: none"> ● Participate in a series of Writing Workshops focused on elements of composition <ul style="list-style-type: none"> ○ <u>EthosPathosLogos-Powerpoint.pptx</u> ○ <div>Transitions</div> ○ <div>Quotation Integration w/Dystopia Examples</div> ○ <u>Counterclaim</u>

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How to navigate academic databases and research a topic with reliable sources	Use library/media specialists as a resource to inform students about databases and how to access them and use them effectively (in-class session)
Revise argument essay	<ul style="list-style-type: none"> • Participate in peer and self-revision workshops and teacher conferences • <u>Global Revision slideshow</u>
How to recognize and identify the conflicts embedded in many popular dystopian films	<p><u>Film Trailers</u></p> <p> <u>dystopian film trailers: conflict notetaker</u></p> <p>identify the main categories of speculative fiction and the kinds of conflicts that drive the plots of themes of this genre. They will then be able to apply these categories and conflict types to their own reading, whether independent choice novel or full class novel.</p>

Revision History

Revision Date	Explanation of change(s) made to document

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Grade/Subject	English III, grade 11
Unit Title:	Experiencing the Essential Questions: Shakespeare's Relevance to Modern Audiences
Overview of Unit:	Students will read a Shakespeare play and identify how its themes are relevant to our world and our lives today. By identifying, tracking, and then discussing specific words, phrases, and passages from the play that connect to our course essential questions, they will discover ways that these classic plays have profound meaning in our contemporary world.
Pacing	Quarter 3

Background Information For The Teacher (Unit Overview)

Rationale:

Hamlet and *Macbeth* are both compelling texts to use to address the essential questions for grade 11. While both plays were written over 400 years ago, the personal, ethical, and political issues they address continue to intrigue viewers, inspire audiences, and inform contemporary artists, actors, writers, and thinkers. Classes will read *either Hamlet* or *Macbeth*. Students will read the majority of the play, supplementing with the viewing of film adaptations of some key scenes. Some classes will use "Shakespeare Made Easy" versions containing the original text side by side with contemporary paraphrasing.

Macbeth raises issues of power, unchecked ambition, self-delusion, and asks how much agency humans actually have over their lives. By the end of the play, the title character and the reader can assess what really matters in life; what gives a life meaning and what makes us human. *Hamlet* also raises relevant issues of where duty to family intersects with duty to self. Hamlet himself questions the meaning of life and whether or not his life is worth living. Through its many characters, *Hamlet* delves into questions of power, delusion, and self-sacrifice.

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While students may find the language of Shakespeare's plays challenging, grappling with the language can be extraordinarily satisfying and lead to discoveries about how much language can inform meaning. Through meaningful, structured, and graded peer conversations, students will articulate their own discoveries within a Shakespearean text.

Students will also view film adaptations of the play, opening up conversations about artistic interpretation and adaptation.

Key Learning/Big Ideas:

- Historical and biographical information about William Shakespeare and theater in Shakespeare's time
- How literary devices (simile, metaphor, alliteration, imagery, meter) enhance meaning (theme, tone, mood)
- Plot structure
- Universal themes (essential questions) embedded in historical literature and in the human experience

Essential Questions

Essential Questions

- What is the nature of truth?
- Are human beings inherently good or evil?
- What governs a person's actions?
- What is the nature of power?

Core Content Standards

Content Specific Standards (NGSS, SS Framework, CCS, etc.)

- CCSS.ELA-Literacy.W.11-12.9
Draw evidence from literary or informational texts to support analysis, reflection, and research.
- CCSS.ELA-Literacy.W.11-12.2.d

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Use precise language, domain-specific vocabulary, and techniques such as metaphor, simile, and analogy to manage the complexity of the topic.

- CCSS.ELA-Literacy.RL.11-12.3

Analyze the impact of the author's choices regarding how to develop and relate elements of a story or drama (e.g., where a story is set, how the action is ordered, how the characters are introduced and developed).

- CCSS.ELA-Literacy.RL.11-12.4

Determine the meaning of words and phrases as they are used in the text, including figurative and connotative meanings; analyze the impact of specific word choices on meaning and tone, including words with multiple meanings or language that is particularly fresh, engaging, or beautiful. (Include Shakespeare as well as other authors.)

- CCSS.ELA-Literacy.RL.11-12.5

Analyze how an author's choices concerning how to structure specific parts of a text (e.g., the choice of where to begin or end a story, the choice to provide a comedic or tragic resolution) contribute to its overall structure and meaning as well as its aesthetic impact.

- CCSS.ELA-Literacy.RL.11-12.7

Analyze multiple interpretations of a story, drama, or poem (e.g., recorded or live production of a play or recorded novel or poetry), evaluating how each version interprets the source text. (Include at least one play by Shakespeare and one play by an American dramatist.)

- CCSS.ELA-Literacy.RL.11-12.10

By the end of grade 11, read and comprehend literature, including stories, dramas, and poems, in the grades 11-CCR text complexity band proficiently, with scaffolding as needed at the high end of the range.

Comprehension and Collaboration:

- CCSS.ELA-Literacy.SL.11-12.1

Initiate and participate effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on grades 11-12 topics, texts, and issues, building on others' ideas and expressing their own clearly and persuasively.

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	<ul style="list-style-type: none"> ● CCSS.ELA-Literacy.SL.11-12.3 <p>Evaluate a speaker's point of view, reasoning, and use of evidence and rhetoric, assessing the stance, premises, links among ideas, word choice, points of emphasis, and tone used.</p> <ul style="list-style-type: none"> ● <u>CCSS.ELA-Literacy.SL.11-12.4</u> <p>Present information, findings, and supporting evidence, conveying a clear and distinct perspective, such that listeners can follow the line of reasoning, alternative or opposing perspectives are addressed, and the organization, development, substance, and style are appropriate to purpose, audience, and a range of formal and informal tasks.</p>
Portrait of the Graduate Characteristics	<ul style="list-style-type: none"> ● Collaborator ● Communicator ● Empathizer ● Problem Solver ● Planner

CELP Standards	<ul style="list-style-type: none"> ● Construct meaning from oral presentations and literary and informational text through grade-appropriate listening, reading, and viewing ● Participate in grade-appropriate oral and written exchanges of information, ideas, and analyses, responding to peer, audience, or reader comments and questions ● Speak and write about grade-appropriate complex literary and informational texts and topics ● Construct grade-appropriate oral and written claims and support them with reasoning and evidence ● Conduct research and evaluate and communicate findings to answer questions or solve problems ● Analyze and critique the arguments of others orally and in writing
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- Adapt language choices to purpose, task, and audience when speaking and writing
- Determine the meaning of words and phrases in oral presentations and literary and informational text
- Create clear and coherent grade-appropriate speech and text
- Make accurate use of standard English to communicate in grade appropriate speech and writing

K-U-D

UNDERSTANDS

Students will understand that:

- While Shakespeare's world may have looked very different from ours, people grappled with many of the same enduring human issues of morality, truth, power, and free will. Shakespeare is not only a product and artifact of his time but also offers timeless lessons and entertainment to a contemporary reader, student, or audience.
- Imagery and figurative language can not only enrich the poetry of the plays but help to communicate characterization, plot, tone, and theme.
- The words in Shakespeare's plays are enhanced by the movement ("blocking") and visual elements. These are often implied in the language of the play. Attention to these elements can help to clarify and complete meaning.
- A thoughtful discussion begins with close reading, careful analysis, as well as listening to others and building off of others' ideas.

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<p style="text-align: center;">KNOW</p> <p style="text-align: center;"><i>Key Facts, formulas, information, vocabulary</i> <i>Can be words, phrases, or sentences</i></p>	<p style="text-align: center;">DO</p> <p style="text-align: center;"><i>Skills of the discipline</i> <i>Can be sub-skills from a standard</i></p>
<ul style="list-style-type: none"> the historical context in which <i>Macbeth</i> or <i>Hamlet</i> was written simile, metaphor, alliteration, imagery, personification, and symbolism soliloquy, stage directions, blocking, mise-en-scène, tragedy, tragic hero, five-act structure how to prepare for an engaging, thoughtful conversation with their peers 	<ul style="list-style-type: none"> watch and take notes on various sources, both primary and secondary resources about Shakespeare's life and time identify and analyze literary devices throughout the play view and analyze various adaptations as well as stage performances in class prepare for and participate in a series of fishbowl discussions



Common Student Misconceptions for this Unit

Students might mistakenly believe:

- Shakespeare and his plays have no relevance to their lives or our world today.
- There is only one way to interpret or stage Shakespeare's plays.
- The language of Shakespeare's plays is indecipherable and beyond their ability or understanding.








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Unit Assessment


Performance Assessment	Other (Formative, quizzes, tests, etc.)
<p>*(Performance Task = “An Inquiry”)</p> <p>Task Overview: (directions for teachers, including what the task is, how it’s authentic, how it might be differentiated, materials, etc.)</p> <p>Students will trace the course essential questions (see above) as well as literary elements while studying the play. At the conclusion of this unit, students will participate in fishbowl discussions that require each student to pose an open-ended discussion question, as well as use direct and paraphrased evidence from the play to support their interpretations and analysis. This activity will encourage the importance of exchanging ideas with their peers to delve deeply into the essential questions we’ve been exploring all year.</p> <p>Teachers may differentiate by combining essential questions, offering question stems, and graphic organizers to help students organize their thoughts.</p> <p>Student Directions: (link to Google document that will be given to students)</p> <p> [Template] hamlet fishbowl 24</p> <p> Macbeth Fishbowl 2024.AP</p>	<ul style="list-style-type: none"> ● graphic organizer to track textual evidence linked to Essential Questions ● engage in a model “no-risk” fishbowl discussion to familiarize students with the fishbowl protocol prior to the summative discussions ● close reading/analysis of selected passages/speeches

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Supplemental Materials and Resources

-  **VIDEOS ON SHAKESPEARE'S LIFE AND WORK:**
-  **Macbeth Journal**
-  **Macbeth Journal for AP Lit**
- **Hamlet Journal**
- **Macbeth Multimedia Project** (AP Lit)
-  **Map of Scotland and Norway**
-  **Map of Scotland**
-  **[Template] Fortinbras and the Last Word. . .** (AP Lit)
-  **[Template] Fortinbras vs. Hamlet**








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Texts			
Required Texts			
Title	Author	Rationale	Lexile Level (where applicable)
<i>Macbeth</i> OR <i>Hamlet</i>	Shakespeare	These tragedies are two of Shakespeare's most engaging and important plays.	
Suggested Texts			
https://myshakespeare.com/		several resources available—from character interviews to etymologies to text read aloud	
Pared down Hamlet copy for level 3s		<u>Hamlet</u>	
Gareth Hinds <i>Macbeth</i> graphic novel		<u>Macbeth Graphic Novel</u> (great resource for EL students or struggling reader)	
"Shakespeare in the Bush" by Laura Bohannon		<ul style="list-style-type: none"> <u>Shakespeare in the Bush Natural History Magazine</u> by Laura Bohannon 	
"Gertrude Talks Back" by Margaret Atwood		<ul style="list-style-type: none">  Margaret Atwood, "Gertrude Talks..." 	

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Learning Plan	
Required Learning Activities	
<i>In Order to Learn:</i>	<i>Students will:</i>
<p>how to listen openly to various perspectives</p> <p>how to advocate respectfully for one's own ideas</p>	<ul style="list-style-type: none"> •  Macbeth Pre-reading questions/Anticipation: Where do you stand ? • <u>Hamlet Pre-reading questions/anticipation guide</u>
<p>how to articulate connections between literature and real life</p>	<ul style="list-style-type: none"> • Essential Questions Reading Journal •  Macbeth Journal for AP Lit •  Hamlet Journal
<p>how to communicate effectively by preparing for and participating in a series of peer-centered, text-specific discussion</p>	<ul style="list-style-type: none"> • Essential Questions Fishbowl Discussions • Use pre-reading questions as formative activity to introduce and practice fishbowl strategy •  Macbeth Prereading •  Macbeth Fishbowl 2024.AP •  Macbeth Fishbowl Rubric •  [Template] hamlet fishbowl 24 •  Hamlet Fishbowl Rubric
<p>how to respond creatively to a piece of literature, reflecting its themes, tone, and characters through the use of figurative</p>	<ul style="list-style-type: none"> •  "Playful" Response to Shakespeare

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language in an alternative media.	
Suggested Learning Activities	
<i>In Order to Learn:</i>	<i>Students will:</i>
<i>Students will watch a brief Ted Talk entitled "Why Shakespeare?" presented by Dr. Stephen Brown.</i>	<ul style="list-style-type: none"> •  "Why Shakespeare? Because it's 2016" Stephen Brown TEDxStMaryCSSchool
<i>Students, in small groups, will consider ways that various characters/themes/symbols/plot points intersect by juxtaposing them and discussing the correct placement w/ their groupmates (planner/communicator/problem solver)</i>	<ul style="list-style-type: none"> •  Hexagonal Thinking for Macbeth
<i>In order to participate effectively in a fishbowl activity, students need to practice using language to deepen their discussions.</i>	<ul style="list-style-type: none"> •  Allen Sentence Frames for the Fishbowl Discussion
<i>In order to prepare for summative discussions on Essential Questions, students may complete these activities to share connections they've noted so far to the Essential Questions</i>	 File  Act III.Essential Question Check-In: Macbeth  Macbeth & the Essential Questions Act I
<i>In order to have students work on figurative language skills</i>	 Creative Response to Shakespeare

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Revision History

Revision Date	Explanation of change(s) made to document

REGION 5 UNIT ORGANIZER

Grade/Subject	English III, grade 11
Unit Title	Who am I and Why Does it Matter?
Overview of Unit	Students will read various model narrative essays and identify how the essay's themes are developed through a variety of narrative techniques. Students will then draft their own essays and work through multiple drafts using personal reflection and teacher and peer feedback to inform their revisions.
Pacing	Unit 4 3-6 weeks

Background Information For The Teacher (Unit Overview)

Rationale:

Personal narrative writing is important as it allows students to reflect on their own experiences, gaining deeper insights into their emotions, beliefs, and values. By sharing personal stories, writers not only connect on a human level but also encourage empathy and understanding among diverse audiences. Crafting narratives helps students find meaning in their own lives and gain a deeper understanding of their own identities.

11th grade students are beginning to think about life post-high school including college, work, and the military. For most college applications and for many other job and scholarship applications, they will be asked to write a personal statement. To that end, we study a wide range of personal essays, both professionally written and student samples, discussing the narrative techniques and structures used by the writers. The unit ends with students writing their own personal narratives, using the current Common App questions as prompts. This unit allows them to apply many of the techniques taught throughout the year and prepares them to begin working on their college applications, for those choosing college.

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Key Learning/Big Ideas:

- narrative techniques: dialogue, pacing, description, reflection, multiple plot lines, characters.
- Introductions: types and techniques to “hook” a reader
- Details and description: painting a picture in words
- Organization: building a story logically and effectively (within the allowed word count of 650 words)
- Personal reflection on learning, growth, and values demonstrated through the narrative
- Writing is a process: revisions based on peer and teacher feedback

Essential Questions

Essential Questions

*Note: students are now asked to reflect on how one or more of these questions is meaningful in some aspect of their own lives:

- What is the nature of truth?
- Are human beings inherently good or evil?
- What governs a person’s actions?
- What is the nature of power?

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Core Content Standards

Content Specific Standards (NGSS, SS Framework, CCS, etc.)

- CCSS.ELA-LITERACY.RL.11-12.3
Analyze the impact of the author's choices regarding how to develop and relate elements of a story or drama (e.g., where a story is set, how the action is ordered, how the characters are introduced and developed).
- CCSS.ELA-LITERACY.RL.11-12.5
Analyze how an author's choices concerning how to structure specific parts of a text (e.g., the choice of where to begin or end a story, the choice to provide a comedic or tragic resolution) contribute to its overall structure and meaning as well as its aesthetic impact.
- CCSS.ELA-LITERACY.W.11-12.3.
Use narrative techniques, such as dialogue, pacing, description, reflection, and multiple plot lines, to develop experiences, events, and/or characters.
- CCSS.ELA-LITERACY.W.11-12.3. Use a variety of techniques to sequence events so that they build on one another to create a coherent whole and build toward a particular tone and outcome (e.g., a sense of mystery, suspense, growth, or resolution).
- CCSS.ELA-LITERACY.W.11-12.3.

Use precise words and phrases, telling details, and sensory language to convey a vivid picture of the experiences, events, setting, and/or characters.
- CCSS.ELA-LITERACY.W.11-12.3.

Provide a conclusion that follows from and reflects on what is experienced, observed, or resolved over the course of the narrative.
- CCSS.ELA-LITERACY.W.11-12.5
Develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience.

Portrait of the Graduate Characteristics

- Collaborator
- Communicator
- Empathizer
- Problem Solver
- Planner

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CELP Standards

- Construct meaning from oral presentations and literary and informational text through grade-appropriate listening, reading, and viewing
- Participate in grade-appropriate oral and written exchanges of information, ideas, and analyses, responding to peer, audience, or reader comments and questions
- Speak and write about grade-appropriate complex literary and informational texts and topics
- Construct grade-appropriate oral and written claims and support them with reasoning and evidence
- Conduct research and evaluate and communicate findings to answer questions or solve problems
- Analyze and critique the arguments of others orally and in writing
- **Adapt language choices to purpose, task, and audience when speaking and writing**
- Determine the meaning of words and phrases in oral presentations and literary and informational text
- **Create clear and coherent grade-appropriate speech and text**
- **Make accurate use of standard English to communicate in grade appropriate speech and writing**

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K-U-D

UNDERSTANDS

Students will understand that:

- Effective writing/storytelling relies on vivid language and specific detail.
- Writers/storytellers must make choices about what to include or omit from their stories.
- Writers/storytellers must make choices about how to craft an engaging introduction and a satisfying conclusion.
- Writers must consider purpose and audience when selecting words, details, tone in writing.
- Good writing/storytelling reveals something important about the writer and/or life.

KNOW

- narrative
- pacing techniques
- dialogue
- descriptive writing/ imagery
- figurative language: metaphor, simile, analogy, personification, symbolism, alliteration and onomatopoeia
- theme
- diction/ syntax/ word choice

DO

- Determine the central theme or implied message of a personal narrative
- Analyze the narrative techniques used by writers
- Organize the telling of a narrative effectively and logically
- Use narrative skills (see list on left) to showcase/ communicate personal values and characteristics
- Give and receive effective feedback
- Edit for clarity and concision
- Share writing in a small group setting

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Common Student Misconceptions for this Unit

Students might mistakenly believe:

- A narrative essay should follow the same format as a thesis-driven argumentative essay.
- Everyday experiences are not interesting enough to serve as the basis for a narrative essay.
- Narrative writing is the same as personal journaling.
- Formal language is needed to convey complex thoughts.

Unit Assessment

Performance Assessment


*(Performance Task = “An Inquiry”)

Task Overview: (directions for teachers, including what the task is, how it’s authentic, how it might be differentiated, materials, etc.)

Students will read model essays to develop an understanding of what constitutes strong narrative writing. At the conclusion of this unit, students will participate in peer editing discussions that require students to share their narrative essays. This activity will encourage the importance of exchanging ideas with their peers and viewing writing as a process of multiple drafts, revised in light of peer feedback and personal reflection. Teachers may differentiate through providing graphic organizers to help

Other (Formative, quizzes, tests, etc.)

- Analyze the prompts (Common App Questions)
- Prewriting activities

 Who Am I? questionnaire

Essence Objects from Ethan Sawyer

Values from Ethan Sawyer

-  01 Writing the College Essay Assignment BRIGHT 24

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students organize their thoughts, conferencing with students, and providing written feedback on drafts.


Student Directions: (link to Google document that will be given to students)

Essay Directions and Rubric

Final Exam Peer Editing Reflection Questions

Final Exam Peer Editing Reflection Questions for Level III





Graphic Organizer

 A Step by Step Procedure for Critical Conversations (protocol for final exam day discussions/sharing of work)


Supplemental Materials and Resources




- Ethan Sawyer's Youtube Channel

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Texts			
Required Texts			
Title	Author	Rationale	Lexile Level (where applicable)
<u>Essays that Worked - Connecticut College</u>	various accepted Conn College students	students can see and evaluate examples of actual student essays	
<u>Essays that Worked Johns Hopkins</u>	various essays from accepted Johns Hopkins students with commentary from writers and readers	students can see and evaluate examples of actual student essays	
 <u>College Essay Es...</u>	Ethan Sawyer	specifically pages 21-30 where students can look at the four types of college essays defined by Sawyer (models A, B, C, D)	
Suggested Texts			
 <u>Writing the Col...</u>	introduction to writing process and elements	provides an overview for unit	
 <u>PERSON...</u>	introduction to writing process and elements	provides an overview for unit	
 <u>Fish Cheeks by ... Common Lit Fish</u>	short personal narrative with reading questions & writing	students can see that narrative techniques are used beyond just the college essay	

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Cheeks Questions	prompt	activity on commonlit.org	
 Arm Wrestling ...	short personal narrative with reading questions & writing prompt		

Learning Plan	
Required Learning Activities	
<i>In Order to Learn :</i>	<i>Students will</i>
determine the central theme or implied message of a personal narrative	<ul style="list-style-type: none"> ● read and analyze sample essays
How to edit for clarity and concision	<ul style="list-style-type: none"> ● peer review ● self review ● conference with the teacher ● complete targeted lessons on specific writing skills such as writing dialogue, using transitions, creating strong openings, developing effective conclusions, and integrating sensory details and figurative language <ul style="list-style-type: none"> ○  Copy of Adjective Elimination ○  Images for Adjective Activity ○ <u>Show Don't Tell Practice</u> ○  WORD INTENSITY: Getting the most out of verbs and adjectives

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Share writing in a small group setting	<ul style="list-style-type: none"> ● peer review their rough drafts ● share their final drafts in groups determined by the teacher ● workshop to develop and revise their ideas
organize the telling of a narrative effectively and logically	<ul style="list-style-type: none"> ● learn different structures by exploring model essays ● outline and draft at least one narrative essay
Use narrative skills to showcase/communicate personal values and characteristics	<ul style="list-style-type: none"> ● complete prewriting exercises to discover their values and characteristics ● analyze model essays that expertly demonstrate values and characteristics through strong narrative techniques
How to give and receive effective feedback	<ul style="list-style-type: none"> ● use graphic organizers to facilitate effective written and oral feedback ● follow a specific final exam protocol for giving and receiving feedback for receiving feedback
Suggested Learning Activities	
<i>In Order to Learn :</i>	<i>Students will:</i>
A range of possible topics, approaches, styles, and techniques for an effective personal essay	<ul style="list-style-type: none"> ●  Essays That Worked: Evaluation Template

Revision History

Revision Date	Explanation of change(s) made to document
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Grade/Subject 9-12	Grade 11 English
Unit Title	Reading and Writing for Standardized Assessments and Everyday Expression
Overview of Unit	Throughout the year, certain grammar topics will be introduced in the context of each unit's written assessments. Teachers will use mentor sentences to teach students about different grammatical structures and thought patterns.
Pacing	Throughout the year

Background Information For The Teacher (Unit Overview)

Rationale:

In this course, students will develop essential strategies for reading comprehension and writing skills that are crucial for success on standardized tests. These skills not only enhance academic performance but also significantly improve communication in everyday life. By focusing on these competencies, students will be better equipped to understand complex texts, articulate their thoughts effectively, and engage confidently in various contexts. This unit is taught throughout the year and aims to empower students with the tools necessary for both academic achievement and personal expression.

Key Learning/Big Ideas:

- Words are the building blocks for ideas.
- Knowledge of common grammatical structures can enhance reading comprehension and written communication.
- Proper punctuation and grammar clarify relationships between ideas.
- Editing is essential to clear written communication.
- Diction creates tone in narrative, argumentative, and informational texts.

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Essential Questions

Essential Questions

- Is punctuation necessary?
- How are structure and function/purpose related?
- Why do we construct ideas?
- How does vocabulary development enhance communication?
- How does knowledge of grammar help me become a better communicator?

Core Content Standards

Content Specific Standards (NGSS, SS Framework, CCS, etc.)

- Reading RL.11-12.2 Determine two or more themes or central ideas of a text and analyze their development over the course of the text, including how they interact and build on one another to produce a complex account; provide an objective summary of the text.
- Reading RI.11-12.6 Determine an author's point of view or purpose in a text in which the rhetoric is particularly effective, analyzing how style and content contribute to the power, persuasiveness, or beauty of the text.
- Reading RL.11-12.4 Determine the meanings of words and phrases as they are used in the text, including figurative and connotative meanings; analyze the impact of specific word choices on meaning and tone, including words

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	<p>with multiple meanings or language that is particularly fresh, engaging, or beautiful. Include Shakespeare as well as other authors.</p> <ul style="list-style-type: none"> ● Reading RI.11-12.6 Determine an author’s point of view or purpose in a text in which the rhetoric is particularly effective, analyzing how style and content contribute to the power, persuasiveness, or beauty of the text. ● Reading RST.11-12.2 Determine the central ideas or conclusions of a text; ● Reading RST.11-12.2 Summarize complex concepts, processes, or information presented in a text by paraphrasing them in simpler but still accurate terms. ● Reading RI.11-12.7 Integrate and evaluate multiple sources of information presented in different media or formats (e.g., visually, quantitatively) as well as in words in order to address a question or solve a problem. ● Reading RST.11-12.5 Analyze how the text structures information or ideas into categories or hierarchies, demonstrating understanding of the information or ideas. ● 11-12.RST.6 Analyze the author’s purpose in providing an explanation, describing a procedure, or discussing an experiment in a text, identifying important issues that remain unresolved.
Portrait of the Graduate Characteristics	<ul style="list-style-type: none"> ● Communicator ● Planner

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K-U-D

UNDERSTANDS

Students will understand that:

- Reading a wide variety of grammatically correct mentor sentences can help students learn to communicate their ideas with greater vividness and precision.
- Understanding punctuation marks and grammatical structures can improve our reading comprehension and written expression in authentic tasks across disciplines.
- Knowing grammar terminology can improve one's ability to identify correct and incorrect grammatical structures.
- How we choose to express ideas is affected by our audience and purpose.

KNOW

- parts of speech: subject, verb, gerunds, participles, infinitives, prepositions, coordinating conjunctions, subordinating conjunctions
- the difference between an independent and dependent clause
- How to effectively include phrases and clauses to enhance clarity and add detail
- How to vary sentence structure
- common grammatical errors (specifically punctuation misuse, modification errors, subject-verb agreement, passive voice, and parallelism errors)
- transition words and their uses

DO

- use commas, semicolons and colons correctly in writing
- capitalize, punctuate, and spell correctly when writing
- identify patterns in mentor sentences in order to develop a deeper understanding of how different parts of speech work together to create meaning
- create complex sentences based on mentor sentences
- write routinely utilizing both phrases and clauses to vary sentence structure
- identify and correct improper use of passive voice
- revise and edit their own writing for proper grammar and punctuation

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- the difference between connotation and denotation

- recognize and fix common grammatical errors
- use transition words to effectively indicate relationships between ideas
- use punctuation marks (commas, colons, dashes, periods, semicolons, parentheses, question marks) to properly indicate relationships between ideas
- strong readers use context clues to help determine the meaning of words
- identify words with connotations and denotations tailored to a specific context

Common Student Misconceptions for this Unit

These can be about content, skills, or processes

Students might mistakenly believe:

- Punctuation marks do not affect the meaning or expression of ideas.
- Complex sentence structures make it more difficult to communicate sophisticated ideas.
- Learning grammar is pointless now that AI tools such as Grammarly exist.
- Generative Artificial Intelligence can replace authentic human voices.

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Unit Assessment

Performance Assessment

*(Performance Task = “An Inquiry”)

Task Overview: (directions for teachers, including what the task is, how it’s authentic, how it might be differentiated, materials, etc.)

All Units of Study over the course of the year will assess grammar standards and skills and assessment will be added authentically to formative and summative performance tasks.

Unit 1 What’s the Big Idea (*Lord of the Flies*)

- Capitalization, period usage, independent and dependent clauses, and sentence structure
- Parts of Speech, subject-verb agreement, and modifiers

Unit 2 Text Self and World

- Transition words, parallelism, and punctuation (commas, colons, semicolons, dashes, and parentheses).
- Context Clues to Determine Meaning, Connotation and Denotation
- Inferences
- Command of Evidence (these questions include infographics)
- Cross-Text Connections

Unit 3: Experiencing the Essential Questions: Shakespeare

- Poetry
- Vocabulary in Context

Other (Formative, quizzes, tests, etc.)

- Parts of Speech Assessment #1
- Parts of Speech Assessment #1 KEY
- Parts of Speech Assessment #2
- Parts of Speech Assessment #2 KEY
- Clauses Assessment
- Clauses Assessment KEY slides to project (hyperlinked)
- Clauses Assessment KEY
- Punctuation Assessment (See the Boundaries questions in this collection of SAT practice questions).

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Student Directions: (link to Google document that will be given to students)

Supplemental Materials and Resources

- College Board Question Bank Question sets and answer keys
- Quill (Lisa confirmed it's allowed)

Texts

Required Texts

Title	Author	Rationale	Lexile Level (where applicable)
<u>College Board</u>	College Board questions	These questions come directly from College	

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<u>Question Bank Compilation</u>	compiled and organized by Theresa Mautner	Board. They are organized by difficulty level: easy, medium, and hard. These questions avoid spoiling official Bluebook Test questions. That is important because taking practice exams is essential to success on the SAT.	
Suggested Texts			
<u>8th Grade Invitation to Explore Grammar Standards starts on Page 60</u>	8th Grade ELA Department	This is the grammar unit for 8th grade.	
Handouts and Slides created by Theresa Mautner <u>What is a sentence slide show</u> (different examples than handout) <u>Script What is a sentence? slideshow</u> <u>What is a sentence? handout</u> <u>What is a sentence</u>	Theresa Mautner		

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<u>KEY</u> <u>Colons Handout</u> <u>Colons reference sheet</u> <u>Semicolons Video by Theresa Mautner</u> <u>Poetry Vocabulary in Context video by TM</u> <u>Semicolons reference sheet by TM</u> <u>Commas reference sheet by TM</u> <u>Top 3 Comma Rules Video</u> <u>Script Top 3 Comma Rules</u>			
Google Form quizzes from Question Bank	stacey@stellarscores.com	This resource is a set of google forms that students can use to submit their answers for the problem sets. You have to email stacey@stellarscores.com to get access. She will share the form with you and then you can make a copy that you can use with your students. This will let you track data easily. I have requested access for the junior English teachers on 11/20/2024.	
SAT Vocab Youtube Videos	Catlin Tucker's SAT Vocabulary Videos	This teacher has created strong Youtube videos explaining SAT Vocabulary Terms and their uses	

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	<u>Note Sheet for Set 1</u> We could make quizzes easily with Magic School AI. I tested it out and it generates different questions even with the same prompt for short answer and multiple choice, so it would be easy to make multiple versions of each quiz to prevent cheating.	in context.	
<i>Mechanically Inclined</i>	Jeff Anderson	This book explains best practices for grammar instruction, focusing on mentor sentences. A new edition with a focus on Writing Workshop will come out in December 2024.	

Learning Plan	
Required Learning Activities	
<i>In order to learn:</i>	<i>Students will:</i>
Parts of Speech (subject, verb, conjunction, and prepositional phrase)	<ul style="list-style-type: none"> ● identify parts of speech in mentor sentences ● create their own sentences modeled on mentor sentences
Independent and Dependent Clauses	<ul style="list-style-type: none"> ● identify independent and dependent clauses in mentor sentences ● correct style and punctuation errors in sentences with independent and dependent clauses

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	<ul style="list-style-type: none"> create their own sentences using subordinating conjunctions to create sentences with both independent and dependent clauses
Punctuation: semicolons, colons, dashes, periods, and commas	<ul style="list-style-type: none"> identify and correct errors in punctuation usage
Connotation versus Denotation	<ul style="list-style-type: none"> study academic vocabulary and create their own sentences that demonstrate an understanding of the connotation and denotation of the target vocabulary
Using context clues to determine the meanings of words	<ul style="list-style-type: none"> analyze passages to determine the meanings of words based on context
Suggested Learning Activities	
	<ul style="list-style-type: none">

Revision History

Revision Date	Explanation of change(s) made to document

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Grade/Subject	10/AP US History
Unit Title	Period 1 (1491-1607)
Overview of Unit	This unit's scope starts with pre-Columbian indigenous peoples in the Americas and ends with the establishment of the English colony of Jamestown in North America. Key AP US History themes explored in the pre to post-Columbian Americas unit include: Geography & Environment; Migration & Settlement; Work, Exchange, & Technology; Power & Politics; Social Structures; and Culture.
Pacing	11 class sessions

Background Information For The Teacher (Unit Overview)

Rationale:

Why study history? Many would argue the most important reason to study history is to better understand the world we live in today. This unit allows students to make connections between the world they live in and the world that existed over five hundred years ago. While this unit focuses on the Columbian exchange, and encounters, competition, and conflict over land and resources, the students' own experiences and the today's headlines make this highly relatable. Students need not go further than the phones in their own pockets to access an exchange of information and ideas online or drive a few miles down the road to encounter foods of different cultures. They lived through a global pandemic, which dramatically impacted their own lives. Their own experiences easily replicate the concepts of the Columbian Exchange and make them highly relatable. Encounters, competition, and conflict over land and resources play out in today's news headlines about the Russia-Ukraine War, competition over trade with China, or other notable world and national events. Through inquiry-based activities, students will not only try to make sense of the content of the world of this unit's time period, but they will be given the tools to better understand their world today by focusing on the differences between evidence and interpretation, determining whose narratives are included and the ways to seek out excluded narratives, and

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that when historical developments are written impacts how they are written about. Thus, history is not stagnant; our understanding of history is always evolving. Through the vehicle of this unit's content, students will develop key historical analysis skills like contextualization, causation, comparison, continuity and change over time, primary and secondary source analysis, key multiple choice, short answer response, and long essay assessment strategies and skills, and key student skills like time management and study skills.

Additionally, College Board's AP United States History Course Description identifies the following important thematic and transferable student understandings to provide a rationale for this unit:

"Geographic and environmental factors, including competition over and debates about natural resources, shape the development of America and foster regional diversity. The development of America impacts the environment and reshapes geography, which leads to debates about environmental and geographic issues. Diplomatic, economic, cultural, and military interactions between empires, nations, and peoples shape the development of America and America's increasingly important role in the world. Geographic and environmental factors, including competition over and debates about natural resources, shape the development of America and foster regional diversity. Social categories, roles, and practices are created, maintained, challenged, and transformed throughout American history, shaping government policy, economic systems, culture, and the lives of citizens."

Key Learning/Big Ideas:

Per College Board AP U.S. History Course Description:

KC-1.1 As native populations migrated and settled across the vast expanse of North America over time, they developed distinct and increasingly complex societies by adapting to and transforming their diverse environments.

KC-1.1.I Different native societies adapted to and transformed their environments through innovations in agriculture, resource use, and social structure.

KC-1.2 Contact among Europeans, Native Americans, and Africans resulted in the Columbian Exchange and significant social, cultural, and political changes on both sides of the Atlantic Ocean.

KC-1.2.I European expansion into the Western Hemisphere generated intense social, religious, political, and economic competition and changes within European societies.

KC-1.2.II The Columbian Exchange and development of the Spanish Empire in the Western Hemisphere resulted in extensive demographic, economic, and social changes.

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KC-1.2.III In their interactions, Europeans and Native Americans asserted divergent worldviews regarding issues such as religion, gender roles, family, land use, and power.

Essential Questions

Compelling Questions

- How does geography/environment impact development?
- How does geography/environment affect conflict?
- How do human interactions/encounters impact development?

Supporting Questions

- What did the Americas look like on the eve of European contact?
- What is agency?
- What is contingency?
- What is the Columbian Exchange?
- What positive and negative effects did the Columbian Exchange have on indigenous peoples and Europeans?
- What is the difference between social, political, and economic development?
- To what extent can European contact with Native Americans be described as subjugation and exploitation?
- What are the similarities and differences of Spanish, Portuguese, English, and French colonization of the Americas?
- What are the different Native American historical interpretation time periods?

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Core Content Standards	
Content Specific Standards (NGSS, SS Framework, CCS, etc.)	<ul style="list-style-type: none"> US.Inq.1.a, US.Inq.1.b, US.Inq.1.c, US.Inq.2.a, US.Inq.3.b, US.Inq.3.c, US.Inq.4.a, US.Inq.4.b, US.Inq.4.c, US.Inq.4.e
CT Core Literacy Standards (non-ELA)	<ul style="list-style-type: none"> Literacy.RH.9-10.1, Literacy.RH.9-10.2, Literacy.RH.9-10.3, Literacy.RH.9-10.4, Literacy.RH.9-10.5, Literacy.RH.9-10.6, Literacy.RH.9-10.8, Literacy.RH.9-10.9, Literacy.RH.9-10.10 Literacy.WHST.9-10.1, Literacy.WHST.9-10.1a, Literacy.WHST.9-10.1b, Literacy.WHST.9-10.1c, Literacy.WHST.9-10.1d, Literacy.WHST.9-10.1e, Literacy.WHST.9-10.2, Literacy.WHST.9-10.2b, Literacy.WHST.9-10.2d, Literacy.WHST.9-10.2e, Literacy.WHST.9-10.4, Literacy.WHST.9-10.5, Literacy.WHST.9-10.9, Literacy.WHST.9-10.10 Literacy.SL.9-10.1, Literacy.SL.9-10.1a, Literacy.SL.9-10.1b, Literacy.SL.9-10.1c, Literacy.SL.9-10.1d, Literacy.SL.9-10.2, Literacy.SL.9-10.6
Portrait of the Graduate Characteristics	<ul style="list-style-type: none"> Collaborator Communicator Empathizer Problem Solver Planner
CELP Standards	<ul style="list-style-type: none"> Construct meaning from oral presentations and literary and informational text through grade-appropriate listening, reading, and viewing Participate in grade-appropriate oral and written exchanges of information, ideas, and analyses, responding to peer, audience, or reader comments and questions

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- Speak and write about grade-appropriate complex literary and informational texts and topics
- Construct grade-appropriate oral and written claims and support them with reasoning and evidence
- Conduct research and evaluate and communicate findings to answer questions or solve problems
- Analyze and critique the arguments of others orally and in writing
- Adapt language choices to purpose, task, and audience when speaking and writing
- **Determine the meaning of words and phrases in oral presentations and literary and informational text**
- Create clear and coherent grade-appropriate speech and text
- Make accurate use of standard English to communicate in grade appropriate speech and writing

K-U-D

UNDERSTANDS

Students will understand that:

- Indigenous peoples had pre-existing, varied, and complex social, political, and economic development prior to European contact.
- Geography/environment play a significant role in societal development.
- Motivations for colonization vary and have significant effects on the indigenous peoples of a place.
- Exchange between different peoples dramatically impacted life for all involved.

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KNOW	DO
<ul style="list-style-type: none"> Key vocabulary including: Bering Isthmus, Incas, Aztecs, Mayans, three-sister farming, horticulturalists, plantation system, Columbian Exchange, maize, Cahokia Mound Builders, Pueblo people, Ute people, Iroquois Confederacy, Mesoamericans, Spanish caste system, mestizo, castizo, Spaniard, mulatto, Tenochtitlan, Renaissance, Treaty of Tordesillas, capitalism, feudalism, missionaries, Black Death, Inquisition, encomienda system, encomenderos, Requerimiento, Columbus, Cortes, Moctezuma, Noche Triste, conquistadors, Battle of Acomà, Juan de Onate, Black Legend, smallpox, Bartolomé de Las Casas, Arawaks, Spanish Armada, Maroon communities, Protestant Reformation, Sir Francis Drake, Roanoke Colony, Walter Raleigh, Jamestown, joint stock company, Powhatan Confederacy 	<ul style="list-style-type: none"> Develop historical analysis skills of inquiry, causation, comparison, historical context, and corroboration. Differentiate between evidence and interpretation. Determine when an event/development is written about impacts how it is written about. Develop APPARTS and CAPP document analysis strategies. Develop ACE short answer quiz strategies. Develop multiple choice quiz strategies. Employ effective essay prompt dissection. Develop key components of AP US History Long Essay writing. Develop student skills: Time management and how to study effectively. Develop visual analysis of primary source images interpretation skills.

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Common Student Misconceptions for this Unit

Students might mistakenly believe:

- All indigenous peoples were hunter gatherers with simplistic societal structures.
- Indigenous peoples primarily lived in North America instead of the majority lived in Central America, the Caribbean, and South America.
- Europeans had the most advanced civilizations of the time and misunderstand how vital the Columbian Exchange was to European development/advancement.
- Europeans were predestined to conquer indigenous peoples of the Americas.

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Unit Assessment

Performance Assessment

Task Overview: (directions for teachers, including what the task is, how it's authentic, how it might be differentiated, materials, etc.)

The three types of performance assessments included below are intended to replicate three of the four assessments students will complete on the College Board AP US History Exam in May. Students will be given twice the time to complete these assessments compared to what they will have on the May exam in an attempt to help them incrementally acclimate to the rigor of the assessments. As the year progresses, this time will be reduced to match time they will have on the actual AP May exam.

Differentiation occurs in class on a daily basis through flexible groupings and individualized or small group instruction embedded within the class learning activities.

Student Directions: (link to Google document that will be given to students)

Multiple Choice Quiz Period 1 (1491-1607) (11 questions in 22 minutes)

Short Answer Response Options (20 minutes):

Short Answer Quiz a Period 1 (1491-1607)

Short Answer Quiz b Period 1 (1491-1607)

Short Answer Quiz c Period 1 (1491-1607)

Other (Formative, quizzes, tests, etc.)

- Students will complete in class practice multiple choice, short answer, and long essay responses assessments and ones provided in College Board's AP Classroom and the *Fabric of a Nation* textbook.
- Class activities and homework that focus on complex historical analysis, primary and secondary source document analysis, causation, continuity & change, comparison, synthesis, visual analysis, thematic connections, corroboration, and counterclaims. Graphic organizers to support, include:
APPARTS Document Analysis
CAPP Document Analysis
Causation
Comparison (Two Developments)
Comparison (Three Developments)
Continuity & Change Over Time
Secondary Source Text Comparisons
Synthesis
Visual Analysis Protocol
Eight Themes of APUSH
- Formative assessments involving prompt dissection, thesis development, essay planning & category development, and

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Long Essay Response Options (60 minutes):

Long Essay Response Rubric

Long Essay Response A Period 1 (1491-1607)

Long Essay Response B Period 1 (1491-1607)

Long Essay Response C Period 1 (1491-1607)

Long Essay Response D Period 1 (1491-1607)

corroborative support are completed in class within flexible groups and presented to classmates for critical friend and teacher feedback.

- Class activities and assessments focus on numerous Portrait of the Graduate characteristics and attributes.

Supplemental Materials and Resources

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Texts			
Required Texts			
Title	Author	Rationale	Lexile Level (where applicable)
<i>Fabric of a Nation</i> , 2024 (Module 1)	Jason Stacy & Matthew Ellington	To provide an additional perspective about indigenous/European encounters and relations so students can analyze multiple perspectives. Also, to provide students with practice analyzing both primary and secondary sources. Primary sources include: Mixtec artisan, Necklace, Aztec empire, fifteenth or sixteenth century, Pueblo "cliff palace," circa 1200 C.E., Chris Columbus, Journal of the First Voyage, October 12, 1492, El Requerimiento, 1513, Illustration by Spanish missionary Bernardino de Sahugun of an Aztec woman with smallpox, image Hernan Cortes assisted by the Tlaxcalan people of Mexico, 1560, Las Castas, unknown artist, eighteenth century, Bartolome de Las Casas, brief account of the Destruction of the Indies, 1542, and Juan Gines de Sepulveda, Concerning the Just Causes of the War against the Indians, 1547.	
Civilizing the Indians	King of Spain Royal Order , 1570	For students to practice determining the difference between evidence and interpretation and to make comparative conclusions about	

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		how indigenous peoples are represented in European accounts of encounters.	
First Summer at Jamestown	Edward Winfield, 1607	For students to practice determining the difference between evidence and interpretation and to make comparative conclusions about how indigenous peoples are represented in European accounts of encounters.	
"New Visions, Old Stories: the Emergence of a New Indian History," 1995	Richard Edmunds	To support student historical analysis skills and determine when a document is written impacts how it is written.	
Leading Facts of Amer. History Date: Originally 1890, Revised 1920		To support student historical interpretation skills by focusing on who is included, how people are named, who has agency, and to determine when a document is written impacts how it is written.	
National Experience-A History of the U.S. Date: Originally 1963, Revised 1981		To support student historical interpretation skills by focusing on who is included, how people are named, who has agency, and to determine when a document is written impacts how it is written.	
<i>A People's History of the United States</i> , "Chapter 1: Columbus, the Indians, and	Howard Zinn	To provide an additional perspective about indigenous/European encounters and relations so students can analyze multiple perspectives.	

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Human Progress”			
Suggested Texts			

Learning Plan	
Required Learning Activities	
<i>In Order to Learn:</i>	<i>Students will:</i>
<p>historical analysis: contextualization, continuity and change, inquiry</p> <p>Collaboration, Communicator, Empathizer</p>	<ul style="list-style-type: none"> ● In collaborative groups, analyze, answer and present responses to the following prompts: <i>What did the Americas look like on the eve of European contact? What part did the environment play in the development of Native American social, political and economic structures?</i> ● In collaborative groups, reenact the first encounter of Moctezuma/Aztecs & Cortez/Spaniards.
<p>historical analysis: evidence v. interpretation, agency, inclusion, comparison, CAPP & APPARTS analysis, inquiry</p> <p>Collaboration, Communicator, Empathizer</p>	<ul style="list-style-type: none"> ● Determine whether document statements are interpretation or evidence and answer interpretive questions ideally working in collaborative groups. Documents used are <i>Civilizing the Indians</i> and <i>First Summer at Jamestown</i>.
historical analysis:	<ul style="list-style-type: none"> ● Working in collaborative groups, dissect and write a thesis statement for the prompt:

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<p>comparison, contingency, essay prompt dissection, inquiry</p> <p>Collaboration, Communicator, Empathizer</p>	<p><i>Analyze the extent to which European contact with Native Americans can be described as subjugation and exploitation. Provide feedback to classmates' thesis responses.</i></p>
<p>historical analysis: comparison, contextualization, agency, inquiry</p> <p>Collaboration, Communicator, Empathizer</p>	<ul style="list-style-type: none"> Working in collaborative groups, students will identify the similarities and differences of Spanish, Portuguese, English, French, and Dutch colonization and the reasons/significance.
<p>historical analysis: contextualization, agency, inclusion, comparison, inquiry</p> <p>Collaboration, Communicator, Empathizer</p>	<ul style="list-style-type: none"> After analyzing Edmunds' "New Visions, Old Stories" APPARTS and Native American history interpretations times periods and working in collaborative groups, students analyze how historical interpretation changes over time based on the time period a document was written in by using two documents about Bacon's Rebellion published in 1920 and 1981.
<p>ACE short answer quiz strategy, Multiple choice quiz strategies, Effective essay prompt dissection, Key components of AP US History essay writing.</p> <p>Communicator and Planner</p>	<ul style="list-style-type: none"> Through direct instruction, the flipped classroom model of instruction, and practice learning activities, learn the College Board requirements for three types of their assessments: Long Essay Response, Short Answer Response, and Multiple Choice Questions.

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Suggested Learning Activities

<i>In Order to Learn:</i>	<i>Students will:</i>
	Suggested learning activities included in College Board's <u>AP United States History Course Description</u>
learning preferences Planner	Complete learning preference inventories (auditory/visual/kinesthetic and concrete sequential/concrete random/abstract sequential/abstract random) and a reflection on them to support their learning and studying.
time management Planner	In reverse classroom and in-class settings, learn the content of successful time management strategies, reflect on their present skill levels for time management, and set time management goals to reflect on at later dates.
effective study skills planner	In reverse classroom and in-class settings, students will learn the content of successful study skills strategies, reflect on their present skill levels for study skills, and set study skills goals to reflect on at later dates.
SAT ELA skills communicator	Be offered options for online SAT ELA practice to strengthen ELA skills. (if exhibited less than average PSAT and STAR/iReady ELA performance),

Revision History

Revision Date	Explanation of change(s) made to document

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Grade/Subject	10/AP US History
Unit Title	Period 2 (1607-1754)
Overview of Unit	This unit's scope starts with the establishment of the first successful English colony in North America, Jamestown, and ends with the start of the Seven Years/French and Indian War. The main focus of the unit is placed on how the North American colonies developed both similarly and differently from each other, as well as how they collectively began to develop their own distinct American identity. Key AP US themes explored in this unit include: American Identity; Geography & Environment; Migration & Settlement; Work, Exchange, & Technology; Power & Politics; Social Structures; and Culture.
Pacing	10 class sessions

Background Information For The Teacher (Unit Overview)

Rationale:

What does it mean to be an American? This is the essential question that students will grapple with throughout the course, and their evolving responses to it likely provide the best rationale for this unit and for the course itself...for students to be able to reflect on who they are and want to be as Americans. Regardless of students' familial or their own national origins and perhaps sometimes to varying degrees, students self-identify as Americans. So, breaking down what that means to them is important, especially during students' developmental stage when they are on a quest to figure out and define who they are. During the time period of this unit and even before the United States became an independent country, key aspects of the American identity began to evolve like a propensity for self-government, multiculturalism, freedom of speech, a free press, and spontaneous movements. Another key aspect of the American identity developed during this time period: migration with the hope of a better life.

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Students will have the opportunity to explore the motivations of migration for a better life during this time period and make connections with the reasons their own families migrated to the United States (if they can). Additionally, students will explore the ways and reasons for regional developmental similarities and differences and how they play out in America today, particularly in American politics and elections. This is important as informed citizens and soon-to-be voters in the United States. Through inquiry-based activities, students will not only try to make sense of the content of the world of this unit's time period, but they will be given the tools to better understand their world today by focusing on the differences between evidence and interpretation, determining whose narratives are included and the ways to seek out excluded narratives, and that who provides a perspective on historical developments dramatically impacts the historical narrative. Thus, in order to be complex and accurate history must be assembled from multiple perspectives. Through the vehicle of this unit's content, students will develop key historical analysis skills like contextualization, causation, comparison, continuity and change over time, primary and secondary source analysis, key multiple choice, short answer response, and document-based essay assessment strategies and skills, and key student skills like speaking and listening, time management, and study skills.

Additionally, College Board's AP United States History Course Description identifies the following important thematic and transferable student understandings to provide a rationale for this unit:

"Push and pull factors shape immigration to and migration within America, and the demographic change as a result of these moves shapes the migrants, society, and the environment. Geographic and environmental factors, including competition over and debates about natural resources, shape the development of America and foster regional diversity. The development of America impacts the environment and reshapes geography, which leads to debates about environmental and geographic issues. The interplay between markets, private enterprise, labor, technology, and government policy shape the American economy. In turn, economic activity shapes society and government policy and drives technological innovation. Diplomatic, economic, cultural, and military interactions between empires, nations, and peoples shape the development of America and America's increasingly important role in the world. In turn, economic activity shapes society and government policy and drives technological innovation. Creative expression, demographic change, philosophy, religious beliefs, scientific ideas, social mores, and technology shape national, regional, and group cultures in America, and these varying cultures often play a role in shaping government policy and developing economic systems."

Key Learning/Big Ideas:

Per College Board AP U.S. History Course Description:

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KC-2.1 Europeans developed a variety of colonization and migration patterns, influenced by different imperial goals, cultures, and the varied North American environments where they settled. They competed with each other and American Indians for resources.

KC-2.1.I Spanish, French, Dutch, and British colonizers had different economic and imperial goals involving land and labor that shaped the social and political development of their colonies as well as their relationships with native populations.

KC-2.1.II In the 17th century, early British colonies developed along the Atlantic coast, with regional differences that reflected various environmental, economic, cultural, and demographic factors.

KC-2.1.III Competition over resources between European rivals and American Indians encouraged industry and trade and led to conflict in the Americas.

KC-2.2 The British colonies participated in political, social, cultural, and economic exchanges with Great Britain that encouraged both stronger bonds with Britain and resistance to Britain's control.

KC-2.2.I Transatlantic commercial, religious, philosophical, and political exchanges led residents of the British colonies to evolve in their political and cultural attitudes as they became increasingly tied to Britain and one another.

KC-2.2.II Like other European empires in the Americas that participated in the Atlantic slave trade, the English colonies developed a system of slavery that reflected the specific economic, demographic, and geographic characteristics of those colonies.

Essential Questions

Compelling Questions

- What does it mean to be an American?

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- What factors affect development?
- What was life like in colonial America from 1607-1754?
- What creates societal unity?

Supporting Questions

- What factors affected American colonial development?
- How did American colonial development impact Native Americans?
- How did Native Americans impact American colonial development?
- To what extent was there British salutary neglect over the American colonies?
- How did geography, patterns of settlement, demographics, economics, political systems, religion, and values create distinct regional differences in the Southern, Middle, and New England colonies?
- How did Bacon's Rebellion impact labor systems in colonial America?
- What remained continuous and what changed in colonial America from 1607-1754?
- What encouraged and discouraged American colonial unity?
- *What is CAPP? Why is CAPP an important aspect of complex document analysis?

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Core Content Standards	
Content Specific Standards (NGSS, SS Framework, CCS, etc.)	<ul style="list-style-type: none"> US.Inq.1.a, US.Inq.1.b, US.Inq.1.c, US.Inq.2.a, US.Inq.3.a, US.Inq.3.b, US.Inq.3.c, US.Inq.4.a, US.Inq.4.b, US.Inq.4.c, US.Inq.4.e
CT Core Literacy Standards (non-ELA)	<ul style="list-style-type: none"> Literacy.RH.9-10.1, Literacy.RH.9-10.2, Literacy.RH.9-10.3, Literacy.RH.9-10.4, Literacy.RH.9-10.5, Literacy.RH.9-10.6, Literacy.RH.9-10.7, Literacy.RH.9-10.8, Literacy.RH.9-10.9, Literacy.RH.9-10.10 Literacy.WHST.9-10.1, Literacy.WHST.9-10.1a, Literacy.WHST.9-10.1b, Literacy.WHST.9-10.1c, Literacy.WHST.9-10.1d, Literacy.WHST.9-10.1e, Literacy.WHST.9-10.2, Literacy.WHST.9-10.2b, Literacy.WHST.9-10.2d, Literacy.WHST.9-10.2e, Literacy.WHST.9-10.4, Literacy.WHST.9-10.5, Literacy.WHST.9-10.9, Literacy.WHST.9-10.10 Literacy.SL.9-10.1, Literacy.SL.9-10.1a, Literacy.SL.9-10.1b, Literacy.SL.9-10.1c, Literacy.SL.9-10.1d, Literacy.SL.9-10.2, Literacy.SL.9-10.4, Literacy.SL.9-10.5, Literacy.SL.9-10.6
Portrait of the Graduate Characteristics	<ul style="list-style-type: none"> Collaborator Communicator Empathizer Problem Solver Planner
CELP Standards	<ul style="list-style-type: none"> Construct meaning from oral presentations and literary and informational text through grade-appropriate listening, reading, and viewing Participate in grade-appropriate oral and written exchanges of information, ideas, and analyses, responding to peer, audience, or reader comments and questions Speak and write about grade-appropriate complex literary and informational texts and topics

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- Construct grade-appropriate oral and written claims and support them with reasoning and evidence
- Conduct research and evaluate and communicate findings to answer questions or solve problems
- Analyze and critique the arguments of others orally and in writing
- Adapt language choices to purpose, task, and audience when speaking and writing
- Determine the meaning of words and phrases in oral presentations and literary and informational text
- Create clear and coherent grade-appropriate speech and text
- Make accurate use of standard English to communicate in grade appropriate speech and writing

K-U-D

UNDERSTANDS

Big ideas, generalizations, principles, concepts, ideas that transfer across situations

Conceptual understandings - not the answers to the EQs but what students will come to understand by grappling them

Students will understand that:

- American regions have developed both similarly and distinctly based on a variety of factors.
- The motivations for migration to the American colonies/United States territory have remained relatively consistent throughout history.
- Many aspects of our current American identity are continuous throughout history and began/emerged during colonial times.
- American Indians have been an integral part of America's development.
- Interactions between and among American Indians and Europeans significantly impact both groups.

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KNOW

Huguenots, colonization v. imperialism, Calvinism, LaSalle, French colonization, Dutch colonization, fur trade, Jamestown, New Amsterdam, Iroquois/Haudenosaunee Confederacy, Algonquins, Pueblo Revolt/Pope's Rebellion, inflation, joint stock company, Virginia Company, indentured servants, Powhatan Confederacy, Chief Powhatan, starving time, cash crop, headright system, House of Burgesses, Pocahontas, John Smith, Privy Council, Maryland Act of Religious Toleration, Church of England, English Civil War, (Barbados) slave code, Governor Berkeley, Nathaniel Bacon, Bacon's Rebellion, West Indies, Protestant Reformation, Pilgrims/Puritans, Mayflower Compact, William Bradford, John Winthrop, Wampanoag, Puritan Migration, Roger Williams, Anne Hutchinson, Salem Witch Trials, Pequot War, Covenant Chain, Metacom's War/King Philip's War, King William's War, Dominion of New England, Enlightenment, Baron de Montesquieu, John Locke, Leisler's Rebellion, William Penn, New England, Middle, Southern Colonies, Quakers, Scots-Irish, redemptioners, Walking Purchase, mercantilism, Navigation Acts, Anglo-Powhatan Wars, Tuscarora War, Yamasee War, King George's War, Queen Anne's War, Middle Passage, Royal African Company, gang labor, Stono Rebellion, New York Rebellion, Jonathan Edwards, First Great Awakening, New Light versus Old Light clergy, impressment, Zenger, salutary neglect, triangular trade, seditious & libel

DO

- Develop CAPP document analysis (Context-historical, Audience, Purpose, Point of View) skills.
- Develop Document-Based Question (DBQ) essay document grouping, planning, and writing skills.
- Develop counterclaim/refuting argument historical thinking and writing development.
- Develop historical analysis skills, including: inquiry, comparison, continuity & change over time, causation, corroboration, and identifying relative importance.
- Develop speaking and listening skills.
- Develop APUSH short answer quiz strategies.
- APUSH multiple choice quiz strategies.
- Employ effective essay prompt dissection skills.
- Develop student skills: Time management and how to study effectively.
- Develop visual analysis of primary source images analysis skills.

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Common Student Misconceptions for this Unit

Students might mistakenly believe:

- All American colonies developed in the same ways and were only made up of English migrants.
- The English were predestined to conquer the indigenous peoples of North America.
- The English were predestined to control North America, having agency over both the indigenous peoples and all other European colonizers in North America.
- All indigenous tribes were mostly the same, with little division existing among them.
- The American identity only began to develop after American independence from Great Britain in 1776.

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Unit Assessment

Performance Assessment

*(Performance Task = “An Inquiry”)

Task Overview: (directions for teachers, including what the task is, how it’s authentic, how it might be differentiated, materials, etc.)

The three types of performance assessments included below are intended to replicate three of the four assessments students will complete on the College Board AP US History Exam in May. Students will be given 1.5 times the time to complete these assessments compared to what they will have on the May exam in an attempt to help them incrementally acclimate to the rigor of the assessments. As the year progresses, this time will be reduced to match time they will have on the actual AP May exam. For their first DBQ essay, students will be given all seven documents in advance of the DBQ essay assessment to annotate, determine main idea, CAPP, etc. Additionally, working in collaborative groups, students will curate artifacts/explanations for either the New England, Middle, or Southern Colonies and serve as docents for a live class American Colonies Museum Exhibit.

Differentiation occurs in class on a daily basis through flexible groupings and individualized or small group instruction embedded within the class learning activities. Also, student choice within the American Colonies Museum exhibit adds an additional layer of differentiation.

Other (Formative, quizzes, tests, etc.)

- CAPP, document grouping, planning, and organizing for a practice DBQ essay prompt.
- Students will complete in class practice multiple choice, short answer, and DBQ essay responses in class assessments and ones provided in College Board’s AP Classroom and the *of a Nation* textbook.
- Class activities and homework that focus on essay prompt dissection, thesis writing, essay planning, primary and secondary source reading & analysis, short answer response practice, and multiple choice practice.
- Formative assessments involving prompt dissection, thesis development, essay planning & category development, document groupings, and corroborative support are completed in class within flexible groups and presented to classmates for critical friend and teacher feedback.
- Class activities and homework that focus on complex historical analysis, primary and secondary source document analysis, causation, continuity & change, comparison, synthesis, visual analysis, thematic connections, corroboration, and counterclaims. Graphic organizers to support, include:
APPARTS Document Analysis

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Student Directions: (link to Google document that will be given to students)

[Multiple Choice Quiz Period 2 \(1607-1754\)](#)

[Short Answer Response A Period 2 \(1607-1754\)](#)

[Short Answer Response B Period 2 \(1607-1754\)](#)

[Short Answer Response C Period 2 \(1607-1754\)](#)

[DBQ Essay Prompt Period 2 \(1607-1754\)](#)

[DBQ Essay Documents Period 2 \(1607-1754\)](#)

[DBQ Essay Response Rubric](#)

[American Colonies Museum Exhibit](#)

[FLOAT Speaking & Listening Rubric for American Colonies Museum Exhibit](#)

[Optional Family Heritage Project](#)

[CAPP Document Analysis](#)

[Causation](#)

[Comparison \(Two Developments\)](#)

[Comparison \(Three Developments\)](#)

[Continuity & Change Over Time](#)

[Secondary Source Text Comparisons](#)

[Synthesis](#)

[Visual Analysis Protocol](#)

[Eight Themes of APUSH](#)

- Class activities and assessments focus on numerous Portrait of the Graduate characteristics and attributes and students will reflect on their own POG performance for the [American Colonial Museum Exhibit self-reflection sheet](#).

Supplemental Materials and Resources

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Texts <i>Texts can be print, visual, film, etc.</i>			
Required Texts			
Title	Author	Rationale	Lexile Level (where applicable)
<i>Fabric of a Nation</i> , 2024 (Module 2)	Jason Stacy & Matthew Ellington	To provide an additional perspective about American colonial development so students can analyze multiple perspectives. Also, to provide students with practice analyzing both primary and secondary sources. Embedded primary source and secondary sources include: King Philip IV of Spain, Letter to Don Luis Valdes, 1647, Francoise Niellon "Quebec in the Time of Champlain," 2009, Powhatan Chief of Algonquian-Speaking Powhatan Confederation, circa 1608, John Martin, "The manner how to bring the Indians into subjugation," 1622, Virginia House of Burgesses, Selected Statutes Passed 1662-1669, Cara Anzilotti, "Autonomy and the Female Planter in Colonial South Carolina," 1997, John Winthrop, A Model of Christian Charity, 1630, John Locke, Second Treatise on Civil Government, 1690, Elizabeth Reis, "The Devil, the Body, and the Feminine Soul in Puritan New England," 1995, British	

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		Parliament, Navigation Act, 1690, Thomas Oliver, writing on behalf of the colonial government of Massachusetts, Letter to Queen Anne, 1708, Richard Haan, "The Trade Do's Not Flourish as Formerly: the Ecological Origins of the Yamasee War of 1715," 1981, William Ramsey, "Something Cloudy in Their Looks: The Origins of the Yamasee War Reconsidered," 2003, King Charles II, Royal African Company Charter, 1672, George Cato, Account of Stono Rebellion, 1937, Mark Smith, Remembering Mary, Shaping Revolt: Reconsidering the Stono Rebellion," 2001, and Benjamin Franklin, Poor Richard's Almanack, 1739.	
"Pennsylvania, the Poor Man's Paradise"	Gabriel Thomas	Serves as a model example of CAPP analysis method.	
"Sinners in the Hands of An Angry God"	Jonathan Edwards	Provides key information and emotional language to help students understand the impact of the First Great Awakening.	
"Zenger & Freedom of the Press"	Constitutional Rights Foundation	Provides contextualization for a key value of the U.S.-freedom of the press.	
"On Educating Women"	John P. Zenger	Shows debates about women's role in society date back to colonial times.	
"The Iroquois Constitution"		Serves as a model of indigenous development, unity, and division.	

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<i>A People's History of the United States</i> , "Chapter 2: Drawing the Color Line"	Howard Zinn	To provide an additional perspective about African enslavement and class divisions so students can analyze multiple perspectives.	
Suggested Texts			

Learning Plan	
Required Learning Activities	
<i>In Order to Learn:</i>	<i>Students will:</i>
CAPP document analysis, DBQ essay writing organization, inquiry Collaborator, Empathizer	Working in collaborative groups, strengthen document analysis skills by completing CAPP document analysis for seven documents for a sample DBQ essay prompt.
Historical analysis, CAPP document analysis, comparison, continuity & change over time, causation, corroboration, identifying relative importance, inquiry Collaborator, Empathizer, Planner, Communicator	Working in collaborative groups, compare and contrast New England, Middle, and Southern colonial development, focusing both on factual support and the reasons for the similar and different development. Working in collaborative groups, students will curate artifacts/explanations for either the New England, Middle, or Southern Colonies and serve as docents for a live class American Colonial Museum Exhibit.

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<p>Historical analysis, relative importance, causation, continuity & change over time, inquiry</p> <p>Collaborator and Empathizer.</p>	<ul style="list-style-type: none"> Using primary source documents, analyze and identify key aspects of and debates about key aspects of the American identity that emerged prior to American independence, including ideas about: religious freedom, freedom, citizenship, self-rule, freedom of the press, unity, and capitalism. Additionally, identify and analyze the impact of key events on American development, including: the Great Awakening, Bacon's Rebellion, the Pequot War, the Powhatan Wars, etc.
<p>Historical analysis, causation, continuity & change, comparison, inquiry</p> <p>Collaborator, Empathizer, Communicator</p>	<ul style="list-style-type: none"> In collaborative groups, be assigned ONE of the four social groups: Native Americans, African-Americans, Women, or Immigrants and answer the question "What was colonial life like?" Complete a Google Form (with name of group, quality of life rating number 1-10, significant events/developments/people) and share their responses and rationale with the class.
<p>Historical analysis, CAPP, causation, counterclaim/refuting argument, corroboration, DBQ essay writing, student self-reflection, inquiry</p> <p>Collaborator, Planner, and Communicator</p>	<ul style="list-style-type: none"> In collaborative groups, group documents, plan DBQ essay body paragraphs, and write a thesis with categories based on the New England documents (analyzed for the first learning activity) for the prompt: <i>Analyze the extent religious beliefs impacted political, economic, and social development in the New England colonies in the 1600s.</i>(Causation) Individually, write DBQ essay based on the plan they created. Run completed essays through Class Companion, an AI tool designed to score student work according to College Board rubrics. Students will complete a DBQ essay self-reflection form identifying strengths, weaknesses, and setting a goal for DBQ Essay writing.
<p>Historical analysis, causation, continuity & change, comparison, corroboration, speaking and listening, inquiry, development of the New England, Middle, and Southern Colonies</p> <p>Planner, Communicator,</p>	<ul style="list-style-type: none"> Research, create, and develop (with choice) American Colonial Museum Exhibit artifacts. Working in collaborative groups, curate artifacts/explanations for either the New England, Middle, or Southern Colonies and serve as docents for a live class American Colonies Museum Exhibit. Also, serve as guests to the two colonial region museum exhibits they did not create and present on.

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Empathizer, & Collaborator	
Suggested Learning Activities	
<i>In Order to Learn:</i>	<i>Students will:</i>
	Suggested learning activities included in College Board's <u>AP United States History Course Description</u>
Motivations for migration to the U.S.	<ul style="list-style-type: none"> Complete the Optional Family Heritage Project
Strengthen Long Essay Response Writing	<ul style="list-style-type: none"> Complete the Option Period 1 (1491-1607) Long Essay Response revision and reflection assignment.

Revision History	
Revision Date	Explanation of change(s) made to document

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Grade/Subject	10/AP US History
Unit Title	Period 3 (1754-1800)
Overview of Unit	This unit's scope starts with the Seven Years/French and Indian War and ends with the election of Jefferson. The main focus of the unit is placed on how and why the English North American colonies declared independence and the growing pains that occurred as America developed democratic institutions during this critical period that still endure today. Key AP US themes explored in this unit include: American Identity; Geography & Environment; Migration & Settlement; Work, Exchange, & Technology; Power & Politics; American & the World; Social Structures; and Culture.
Pacing	10 class sessions

Background Information For The Teacher (Unit Overview)

Rationale:

"I pledge allegiance to the flag of the United States of America, and to the republic for which it stands, one nation under God, indivisible, with liberty and justice for all." Each morning and ritually, students hear and have the opportunity to speak these words in our classrooms. This unit helps students move beyond the ritual and gain a more complex historical understanding of how and why America gained independence and, through arduous debate and compromise, created the democratic institutions that endure today. It also challenges students to reflect on preconceived notions about numerous social groups during the time period and the impacts on agency and the development of today's United States as we continue to evolve and strive for liberty and justice for all. In exploring the numerous compromises and evolutions of American government and institutions during this unit's time period, students are exposed to alternatives to the winner-takes-all mentality of today's political polarization and can apply alternative strategies to solve today's issues as soon-to-be voters. Through inquiry-based activities, students will not only try to make sense of the content of the world of this unit's time period, but they will be given the tools to better understand their world today by

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analyzing and understanding the impact of language and visual media, determining whose narratives are included and the ways to seek out excluded narratives, and exploring how non-voting peoples can impact society, government, and the economy. Thus, even as non-voters themselves, students have an important role to play in our country. Through inquiry-based activities and the vehicle of this unit's content, students will develop key historical analysis skills like contextualization, causation, comparison, continuity and change over time, primary and secondary source analysis, key multiple choice, short answer response, and long essay assessment strategies and skills, and key student skills like time management, and study skills.

Additionally, College Board's AP United States History Course Description identifies the following important thematic and transferable student understandings to provide a rationale for this unit:

"Diplomatic, economic, cultural, and military interactions between empires, nations, and peoples shape the development of America and America's increasingly important role in the world. The development of and debates about democracy, freedom, citizenship, diversity, and individualism shape American national identity, cultural values, and beliefs about American exceptionalism, and in turn, these ideas shape political institutions and society. Throughout American history, notions of national identity and culture have coexisted with varying degrees of regional and group identities. Social categories, roles, and practices are created, maintained, challenged, and transformed throughout American history, shaping government policy, economic systems, culture, and the lives of citizens. Debates fostered by social and political groups about the role of government in American social, political, and economic life shape government policy, institutions, political parties, and the rights of citizens. Creative expression, demographic change, philosophy, religious beliefs, scientific ideas, social mores, and technology shape national, regional, and group cultures in America, and these varying cultures often play a role in shaping government policy and developing economic systems. Push and pull factors shape immigration to and migration within America, and the demographic change as a result of these moves shapes the migrants, society, and the environment."

Key Learning/Big Ideas:

Per College Board AP U.S. History Course Description:

KC-3.1 British attempts to assert tighter control over its North American colonies and the colonial resolve to pursue self-government led to a colonial independence movement and the Revolutionary War.

KC-3.1.I The competition among the British, French, and American Indians for economic and political advantage in North America culminated in the Seven Years' War (the French and Indian War), in which Britain defeated France and allied American Indians.

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KC-3.1.II The desire of many colonists to assert ideals of self-government in the face of renewed British imperial efforts led to a colonial independence movement and war with Britain.

KC-3.2 The American Revolution's democratic and republican ideals inspired new experiments with different forms of government.

KC-3.2.I The ideals that inspired the revolutionary cause reflected new beliefs about politics, religion, and society that had been developing over the course of the 18th century.

KC-3.2.II After declaring independence, American political leaders created new constitutions and declarations of rights that articulated the role of the state and federal governments while protecting individual liberties and limiting both centralized power and excessive popular influence.

KC-3.2.III.i New forms of national culture and political institutions developed in the United States alongside continued regional variations and differences over economic, political, social, and foreign policy issues.

KC-3.3 Migration within North America and competition over resources, boundaries, and trade intensified conflicts among peoples and nations.

KC-3.3.I In the decades after American independence, interactions among different groups resulted in competition for resources, shifting alliances, and cultural blending.

KC-3.3.II The continued presence of European powers in North America challenged the United States to find ways to safeguard its borders, maintain neutral trading rights, and promote its economic interests.

Essential Questions

Compelling Questions

- What does it mean to be an American?
- What causes people to revolt?

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- What makes revolutions successful?
- What makes a good leader?

Supporting Questions

- What was the legacy of the Seven Years/French & Indian War?
- How did the Seven Years/French & Indian War set the stage for the Revolutionary War?
- What caused the Revolutionary War?
- How did the Revolutionary War impact Americans differently?
- To what extent was the American Revolutionary War a civil war?
- What happened to the indigenous peoples of North America after the Revolutionary War?
- How did the colonists' experiences with the British monarchy shape their political ideas and early American democratic institutions?
- Who was the best leader during the critical period from 1787-1800: Washington, Hamilton, Adams, or Jefferson?
- How do the *Federalists Papers* reflect American values and political beliefs of the critical period time frame?
- When did the American Revolution begin and when did it end?

Core Content Standards

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<p>Content Specific Standards (NGSS, SS Framework, CCS, etc.)</p>	<ul style="list-style-type: none"> US.Inq.1.a, US.Inq.1.b, US.Inq.1.c, US.Inq.2.a, US.Inq.3.a, US.Inq.3.b, US.Inq.3.c, US.Inq.4.a, US.Inq.4.b, US.Inq.4.c, US.Inq.4.e
<p>CT Core Literacy Standards (non-ELA)</p>	<ul style="list-style-type: none"> Literacy.RH.9-10.1, Literacy.RH.9-10.2, Literacy.RH.9-10.3, Literacy.RH.9-10.4, Literacy.RH.9-10.5, Literacy.RH.9-10.6, Literacy.RH.9-10.8, Literacy.RH.9-10.9, Literacy.RH.9-10.10 Literacy.WHST.9-10.1, Literacy.WHST.9-10.1a, Literacy.WHST.9-10.1b, Literacy.WHST.9-10.1c, Literacy.WHST.9-10.1d, Literacy.WHST.9-10.1e, Literacy.WHST.9-10.2, Literacy.WHST.9-10.2b, Literacy.WHST.9-10.2d, Literacy.WHST.9-10.2e, Literacy.WHST.9-10.4, Literacy.WHST.9-10.5, Literacy.WHST.9-10.9, Literacy.WHST.9-10.10 Literacy.SL.9-10.1, Literacy.SL.9-10.1a, Literacy.SL.9-10.1b, Literacy.SL.9-10.1c, Literacy.SL.9-10.1d, Literacy.SL.9-10.2, Literacy.SL.9-10.4, Literacy.SL.9-10.6
<p>Portrait of the Graduate Characteristics</p>	<ul style="list-style-type: none"> Collaborator Communicator Empathizer Problem Solver Planner

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CELP Standards

- **Construct meaning from oral presentations and literary and informational text through grade-appropriate listening, reading, and viewing**
- Participate in grade-appropriate oral and written exchanges of information, ideas, and analyses, responding to peer, audience, or reader comments and questions
- Speak and write about grade-appropriate complex literary and informational texts and topics
- Construct grade-appropriate oral and written claims and support them with reasoning and evidence
- Conduct research and evaluate and communicate findings to answer questions or solve problems
- Analyze and critique the arguments of others orally and in writing
- Adapt language choices to purpose, task, and audience when speaking and writing
- Determine the meaning of words and phrases in oral presentations and literary and informational text
- Create clear and coherent grade-appropriate speech and text
- **Make accurate use of standard English to communicate in grade appropriate speech and writing**

K-U-D

UNDERSTANDS

Students will understand that:

- Numerous political, economic, social, and foreign policy factors, both short and long term, can be catalysts for revolution.
- The Revolutionary War and its outcome impacted various social, political, and economic groups of Americans unevenly.
- Larger, more existential threats can prioritize national unity over social, political, and economic regional divisions.

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- Foreign influences can have a substantial impact on the outcome of wars.
- Past historical experiences can directly shape the future development of countries.
- The contributions of specific, influential leaders can significantly impact foreign and domestic developments.
- The promise of American Revolutionary ideals, beliefs, and values still endure and are strived for today.

KNOW

- **Period 3 (1754-1800) Key Terms**
- Terms such as: King George III, French & Indian War/Seven Years War, Albany Congress, guerilla tactics, Fort Duquesne, Proclamation Line of 1763, Peace of Paris, impressment, Pontiac's Rebellion, salutary neglect, Regulator Movement, Paxton Boys, Quartering Act, Sugar Act, Currency Act, Committee of Correspondence, Stamp Act, virtual representation, Sons of Liberty, Daughters of Liberty, George Washington, Patrick Henry, Virginia Resolves, Samuel Adams, John Adams, Abigail Adams, Stamp Act Congress, Declaratory Act, Townshend Acts, Boston Massacre, Tea Act, Boston Tea Party, Coercive/Intolerable Acts, Quebec Act, patriots, loyalists, Phillis Wheatley, First Continental Congress, Second Continental Congress, Lexington & Concord, Bunker Hill, minutemen, Continental Army, Dunmore's Proclamation, John Locke, Thomas Jefferson, Declaration of Independence, Benjamin Franklin, Valley Forge, Battle of Saratoga, Battle of Yorktown, Treaty of Paris,

DO

- Develop historical analysis skills, including: inquiry, comparison, continuity & change over time, causation, corroboration, and identifying relative importance.
- Develop writing skills, including: claims, corroborative support, planning & organizing essay writing, timed essay writing
- Develop primary and secondary source reading analysis skills.
- Develop APUSH short answer quiz strategies.
- Develop APUSH multiple choice quiz strategies.
- Employ effective essay prompt dissection skills.
- Develop visual analysis of primary source images and political cartoons analysis skills.

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Cornwallis, Rochambeau, Articles of Confederation, republican motherhood, 3/5th Compromise, Statute of Religious Freedom, Northwest Ordinances, Shays' Rebellion, Naturalization Act, Constitutional Convention, Great (Connecticut) Compromise, separation of powers, electoral college, checks and balances, Federalist Papers, James Madison, Alexander Hamilton, Bill of Rights, Bank of the United States, funding at par, assumption, French Revolution, Washington's Neutrality Proclamation, Jay Treaty, Whiskey Rebellion, Federalists, Antifederalists, Democratic Republicans, XYZ Affair, Pinckney Treaty, Alien & Sedition Acts, Virginia & Kentucky Resolutions, Indian Trade & Intercourse Act, Battle of Fallen Timbers, Treaty of Greenville, Thomas Paine, admiralty courts, Judiciary Act of 1789

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Common Student Misconceptions for this Unit

Students might mistakenly believe:

- The Seven Years/French and Indian War was confined to North America and that it was not a larger global war.
- The British were predestined to control North America, rather than understanding that the French, Dutch, and Spanish were actively fighting for control of North America and that Native Americans played a vital role in the outcome of these conflicts.
- All colonial Americans were unified in their opposition to the British crown and their desire to be an independent country.
- Only colonists played a role in independence; other social groups (Native Americans, enslaved Africans, etc.).
- The Patriots were predestined to win the Revolutionary War.
- The Revolutionary War started after the Declaration of Independence.
- Enslaved people voted and their votes counted as three-fifths of a vote in the Three-fifths Compromise.

Unit Assessment

Performance Assessment

Task Overview:

The three types of performance assessments included below are intended to replicate three of the four assessments students will complete on the

Other (Formative, quizzes, tests, etc.)

- Class activities and homework that focus on essay prompt dissection, thesis writing, essay planning, primary and secondary source reading & analysis, short answer response practice, and multiple choice practice.
- Formative assessments involving prompt dissection, thesis development, essay planning & category development, and

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College Board AP US History Exam in May. Students will be given 1.25 times the time to complete these assessments compared to what they will have on the May exam in an attempt to help them incrementally acclimate to the rigor of the assessments. As the year progresses, this time will be reduced to match time they will have on the actual AP May exam.

Differentiation occurs in class on a daily basis through flexible groupings and individualized or small group instruction embedded within the class learning activities.

Student Directions: (link to Google document that will be given to students)

[Multiple Choice Quiz Period 3 \(1607-1754\)](#)

[Short Answer Quiz A Period 3 \(1607-1754\)](#)

[Short Answer Quiz B Period 3 \(1607-1754\)](#)

[Short Answer Quiz C Period 3 \(1607-1754\)](#)

[Long Essay A Period 3 \(1754-1800\)](#)

[Long Essay B Period 3 \(1754-1800\)](#)

[Long Essay C Period 3 \(1754-1800\)](#)

[Long Essay D Period 3 \(1754-1800\)](#)

[Long Essay Response Rubric](#)

corroborative support are completed in class within flexible groups and presented to classmates for critical friend and teacher feedback.

- Class activities and homework that focus on complex historical analysis, primary and secondary source document analysis, causation, continuity & change, comparison, synthesis, visual analysis, thematic connections, corroboration, and counterclaims. Graphic organizers to support, include:

[APPARTS Document Analysis](#)

[CAPP Document Analysis](#)

[Causation](#)

[Comparison \(Two Developments\)](#)

[Comparison \(Three Developments\)](#)

[Continuity & Change Over Time](#)

[Secondary Source Text Comparisons](#)

[Synthesis](#)

[Visual Analysis Protocol](#)

[Eight Themes of APUSH](#)

- [Student Self-Reflection Writing Graphic Organizer](#)
- Class activities and assessments focus on numerous Portrait of the Graduate characteristics and attributes.

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Supplemental Materials and Resources

- *John Adams* mini-series and *Hamilton* play

Texts

Required Texts

Title	Author	Rationale	Lexile Level (where applicable)
<i>Fabric of a Nation</i> , 2024 (Module 3)	Jason Stacy & Matthew Ellington	To provide an additional perspective about the revolutionary and critical periods so students can analyze multiple perspectives. Also, to provide students with practice analyzing both primary and secondary sources. Primary sources include several seminal U.S. documents like: the <i>Declaration of Independence</i> , <i>Articles of Confederation</i> , and the <i>U.S. Constitution</i> . Additional primary sources include: North America before and after the French and Indian War map, Patrick Henry, <i>Virginia Resolves</i> , 1765, "Account of the Boston Tea Party," <i>Massachusetts Gazette</i> , 1773, Paine's <i>Common Sense</i> , Charles Inglis- <i>The true interest of America impartially stated-In response to Common Sense</i> , 1776, Phillis Wheatley, "On	

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		<i>Being Brought from Africa to America, 1770, Treaty of Alliance between the United States and France, 1778 , Petition of Enslaved Black Americans to the Massachusetts Legislature, 1777, Thomas Cole, Peter Bassnett Matthewes, and Matthew Web, free Black Americans, Petition to the South Carolina Senate, 1791, Image of Daniel Shays and Jacob Shattuck, Boston Almanac, 1787, Alexander Hamilton, Federalist Arguments at the New York State Convention, June 1788, Alien and Sedition Acts, Kentucky Resolution, 1799, Benjamin Banneker, Letter to Thomas Jefferson, 1791, and United Indian Nations Council, Message to Congress, 1786.</i>	
"The Able Doctor, or Swallowing the Bitter Draught" political cartoon	Paul Revere	To support students' development of political cartoon analysis skills and to help them understand the impact of British imperial policies.	
"Which Side to Take, Revolutionary or Loyalist?"	Carole Watterson Troxler	To provide a more complex understanding of why colonists took the sides they did during the Revolutionary War.	
<i>Federalist Papers 10 & 51</i>	James Madison	To support student primary source document analysis skills and to show the debates about democracy/human nature that exist today occurred during the Critical Period as well.	
<i>Washington's Farewell</i>	George Washington	To how and why several presidential precedents	

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Address		(e.g. warning of the harm of factions/political parties and permanent foreign alliances, only serving two terms in office, and giving a farewell address) were established by the first president of the United States.	
<i>A People's History of the United States</i> , "Chapter 4: Tyranny is Tyranny"	Howar Zinn	To provide an additional perspective about class and class divisions so students can analyze multiple perspectives.	
Suggested Texts			

Learning Plan	
Required Learning Activities	
<i>In Order to Learn:</i>	<i>Students will:</i>
Historical analysis, relative importance, causation, thesis writing, inquiry Communicator & Collaborator	<ul style="list-style-type: none"> Working in collaborative groups, strengthen prompt dissection & thesis writing skills by writing a historically defensible claim response to the prompt: <i>Analyze the relative importance of the causes of the Revolutionary War.</i>
Historical analysis skills, continuity & change, comparison, inquiry	<ul style="list-style-type: none"> Working in collaborative groups, determine the impact the Revolutionary War had on white men, white women, African Americans, Native Americans, and Loyalists.

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Communicator, Empathizer, & Collaborator	
<p>Historical analysis, causation, thesis writing, long essay planning, inquiry</p> <p>Communicator, Empathizer, Planner, & Collaborator</p>	<ul style="list-style-type: none"> Working in collaborative groups, analyze primary sources, craft a historically defensible thesis, and complete a long essay graphic organizer answering the prompt: <i>Analyze the extent the American Revolutionary War was a civil war.</i>
<p>Historical analysis, causation, continuity & change over time, inquiry</p> <p>Communicator & Collaborator</p>	<ul style="list-style-type: none"> Working in collaborative groups, determine how the colonists' experiences with the British monarchy shaped their political beliefs and early democratic institutions (Declaration of Independence, Articles of Confederation, Constitution).
<p>Historical analysis, comparison, continuity & change over time, inquiry</p> <p>Communicator & Collaborator</p>	<ul style="list-style-type: none"> Analyze <i>Federalists 10 & 51</i> and determine to what extent the issues presented in them are still relevant today
<p>Historical analysis, comparison, corroboration, inquiry</p> <p>Communicator & Problem Solver</p>	<ul style="list-style-type: none"> Determine who was the best leader for America during the critical period from 1787-1800: Washington, Hamilton, Adams, or Jefferson and provide rationale with corroborative support, based on the historical context and challenges of the Critical Period.
<p>Historical analysis, continuity & change over time, corroboration, inquiry</p>	<ul style="list-style-type: none"> In collaborative groups, determine when the American Revolution began and when it ended, providing a historically defensible rationale and corroborative support.

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Communicator & Collaborator	
Suggested Learning Activities	
<i>In Order to Learn:</i>	<i>Students will:</i>
	Suggested learning activities included in College Board's <u>AP United States History Course Description</u>
Historical analysis, eight themes of APUSH, corroborative support. Communicator	<ul style="list-style-type: none"> ● Watch the <i>John Adams</i> mini-series and determine which of the eight themes of APUSH appear in each episode-providing substantive support.
Historical analysis, eight themes of APUSH, corroborative support. Communicator	<ul style="list-style-type: none"> ● Watch the <i>Hamilton</i> musical and determine which of the eight themes of APUSH appear in it-providing substantive support.

Revision History

Revision Date	Explanation of change(s) made to document

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Grade/Subject	10/AP US History
Unit Title	Period 4 (1800-1848)
Overview of Unit	This unit's scope starts with the election of Jefferson, the first peaceful transition of power between rival political parties, and the ushering in of Jeffersonian democracy. It ends with the Seneca Falls Conventions, the first national women's convention in U.S. History. Emphasis in this antebellum unit is placed on the continued development of, expansion of, and debates about republican democracy for more Americans, the growth of the market economy, U.S. developments in foreign relations, and the growth of reform movements for many social groups lacking agency ushered in by the catalysts of the Second Great Awakening and transcendentalist ideas. Key AP US themes explored in this unit include: American Identity; Geography & Environment; Migration & Settlement; Work, Exchange, & Technology; Power & Politics; American & the World; Social Structures; and Culture.
Pacing	10 class sessions

Background Information For The Teacher (Unit Overview)

Rationale:

Can non-voting members of a country impact its development? This unit answers that question with a resounding YES and encourages students to realize that, even as non-voters, they have a role to play and agency in the United States. This country is theirs to mold and shape. In this unit, students will analyze how spontaneous movements developed and inspired other reform movements, collectively creating momentum toward the attainment of democratic ideals and potentially democracy for a wider range of Americans even if they did not achieve their goals during this antebellum era. They planted seeds for success in later time periods, encouraging students to understand that lasting change takes time. This unit is relatable to students because they have witnessed, and potentially participated in, numerous movements and organized civic actions in their own lifetimes (for or against U.S. actions and/or investments in the Israel/Hamas War, for or against pandemic restrictions, Black Lives Matter, March for

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Our Lives, #Metoo, etc.). Students have seen first hand that the work to attain many of the American values, beliefs, and ideals evident in antebellum reform movements is still ongoing today. The work for democracy is, therefore, ongoing and never done. This unit also explores political polarization that evolved from debates over the economy and the balance of power between the federal and state governments, debates that are still ongoing and polarizing today. Finally, the fervent debates, failed compromises, and pre-Civil War violent clashes over slavery provide students with a road map of what not to do to resolve conflict. Through inquiry-based activities and the vehicle of this unit's content, students will develop key historical analysis skills like contextualization, causation, comparison, continuity and change over time, primary and secondary source analysis, key multiple choice, short answer response, and document-based essay assessment strategies and skills, and key student skills like speaking and listening, time management, and study skills.

Additionally, College Board's AP United States History Course Description identifies the following important thematic and transferable student understandings to provide a rationale for this unit:

"Debates fostered by social and political groups about the role of government in American social, political, and economic life shape government policy, institutions, political parties, and the rights of citizens. Diplomatic, economic, cultural, and military interactions between empires, nations, and peoples shape the development of America and America's increasingly important role in the world. The interplay between markets, private enterprise, labor, technology, and government policy shape the American economy. In turn, economic activity shapes society and government policy and drives technological innovation. Social categories, roles, and practices are created, maintained, challenged, and transformed throughout American history, shaping government policy, economic systems, culture, and the lives of citizens. Creative expression, demographic change, philosophy, religious beliefs, scientific ideas, social mores, and technology shape national, regional, and group cultures in America, and these varying cultures often play a role in shaping government policy and developing economic systems. Geographic and environmental factors, including competition over and debates about natural resources, shape the development of America and foster regional diversity. The development of America impacts the environment and reshapes geography, which leads to debates about environmental and geographic issues."

Key Learning/Big Ideas:

Per College Board AP U.S. History Course Description:

KC-4.1 The United States began to develop a modern democracy and celebrated a new national culture, while Americans sought to define the nation's democratic ideals and change their society and institutions to match them.

KC-4.1.I The nation's transition to a more participatory democracy was achieved by expanding suffrage from a system based on property ownership to one based on voting by all adult white men, and it was accompanied by the growth of political parties.

KC-4.1.II While Americans embraced a new national culture, various groups developed distinctive cultures of their own.

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KC-4.1.III Increasing numbers of Americans, many inspired by new religious and intellectual movements, worked primarily outside of government institutions to advance their ideals.

KC-4.2 Innovations in technology, agriculture, and commerce powerfully accelerated the American economy, precipitating profound changes to U.S. society and to national and regional identities.

KC-4.2.I New transportation systems and technologies dramatically expanded manufacturing and agricultural production.

KC-4.2.II The changes caused by the market revolution had significant effects on U.S. society, workers' lives, and gender and family relations.

KC-4.2.III Economic development shaped settlement and trade patterns, helping to unify the nation while also encouraging the growth of different regions.

KC-4.3 The U.S. interest in increasing foreign trade and expanding its national borders shaped the nation's foreign policy and spurred government and private initiatives.

KC-4.3.I Struggling to create an independent global presence, the United States sought to claim territory throughout the North American continent and promote foreign trade.

KC-4.3.II The United States' acquisition of lands in the West gave rise to contests over the extension of slavery into new territories.

Essential Questions

Compelling Questions:

- What does it mean to be an American?
- How can democracy expand?
- Who should have power?
- What does it mean to be revolutionary?

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Supporting Questions

- To what extent were Thomas Jefferson and Andrew Jackson revolutionary presidents?
- Did judicial or executive power expand more from 1800-1848?
- How should Indian Removal in the 1830s be remembered?
- How did westward expansion fundamentally change America?
- Did westward expansion lead to an expansion of democracy and democratic ideals?
- To what extent did antebellum reform movements lead to an expansion of democracy and democratic ideals?

Core Content Standards	
Content Specific Standards (NGSS, SS Framework, CCS, etc.)	<ul style="list-style-type: none"> ● US.Inq.1.a, US.Inq.1.b, US.Inq.1.c, US.Inq.2.a, US.Inq.3.a, US.Inq.3.b, US.Inq.3.c, US.Inq.4.a, US.Inq.4.b, US.Inq.4.c, US.Inq.4.e
CT Core Literacy Standards (non-ELA)	<ul style="list-style-type: none"> ● Literacy.RH.9-10.1, Literacy.RH.9-10.2, Literacy.RH.9-10.3, Literacy.RH.9-10.4, Literacy.RH.9-10.5, Literacy.RH.9-10.6, Literacy.RH.9-10.7, Literacy.RH.9-10.8, Literacy.RH.9-10.9, Literacy.RH.9-10.10 ● Literacy.WHST.9-10.1, Literacy.WHST.9-10.1a, Literacy.WHST.9-10.1b, Literacy.WHST.9-10.1c, Literacy.WHST.9-10.1d, Literacy.WHST.9-10.1e, Literacy.WHST.9-10.2, Literacy.WHST.9-10.2b, Literacy.WHST.9-10.2d, Literacy.WHST.9-10.2e, Literacy.WHST.9-10.4, Literacy.WHST.9-10.5, Literacy.WHST.9-10.9, Literacy.WHST.9-10.10

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	<ul style="list-style-type: none"> ● Literacy.SL.9-10.1, Literacy.SL.9-10.1a, Literacy.SL.9-10.1b, Literacy.SL.9-10.1c, Literacy.SL.9-10.1d, Literacy.SL.9-10.2, Literacy.SL.9-10.4, Literacy.SL.9-10.5, Literacy.SL.9-10.6
Portrait of the Graduate Characteristics	<ul style="list-style-type: none"> ● Collaborator ● Communicator ● Empathizer ● Problem Solver ● Planner

CELP Standards	<ul style="list-style-type: none"> ● Construct meaning from oral presentations and literary and informational text through grade-appropriate listening, reading, and viewing ● Participate in grade-appropriate oral and written exchanges of information, ideas, and analyses, responding to peer, audience, or reader comments and questions ● Speak and write about grade-appropriate complex literary and informational texts and topics ● Construct grade-appropriate oral and written claims and support them with reasoning and evidence ● Conduct research and evaluate and communicate findings to answer questions or solve problems ● Analyze and critique the arguments of others orally and in writing ● Adapt language choices to purpose, task, and audience when speaking and writing ● Determine the meaning of words and phrases in oral presentations and literary and informational text ● Create clear and coherent grade-appropriate speech and text ● Make accurate use of standard English to communicate in grade appropriate speech and writing
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K-U-D

UNDERSTANDS

Students will understand that:

- The work of democracy and attainment of democratic rights for a wider range of Americans that live up to fundamental American ideals is ongoing and never done.
- Revolutionary change continued to happen in America long after the Revolutionary War.
- Social reform movements inspire and impact each other.
- Collectively and inspired by democratic ideals, even those without social, political, and/or economic agency, can impact and expand democracy.
- Power struggles between branches of government to resolve debates about the fundamental role of government have and will continue to exist throughout American history.
- Debates about slavery caused significant division in America.
- Debates and conflict about American Indian agency and American Indian responses had a significant impact on United States history.
- The market revolution and the expansion of capitalism is a fundamental part of the American economy and identity.
- A continuity in American history has been that the United States, to varying degrees, asserts its agency on the world stage.

KNOW

Barbary pirates, Haitian Revolution, Napoleone Bonaparte, Louisiana Purchase, Lewis & Clark Expedition, Sacagawea, Marbury v. Madison, judicial review, McCulloch v. Maryland, Judiciary Act of 1801, Embargo Act of 1807, Non-Intercourse Act, Jeffersonian restraint, patronage,

DO

- Develop CAPP document analysis (Context-historical, Audience, Purpose, Point of View) skills.
- Develop Document-Based Question (DBQ) essay prompt dissection, thesis writing, document grouping, planning, corroboration, and writing skills.

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Tripolitan War, impressment, Chesapeake affair, Macon's Bill No. 2, Tariff of 1816, American System/Henry Clay, Panic of 1819, Congress of Vienna, Napoleonic Wars, Jefferson, Madison, Missouri Compromise, Tecumseh & "the Prophet," Battle of Tippecanoe, War of 1812, Battle of Horseshoe Bend, Hartford Convention of 1814, Treaty of Ghent, Battle of New Orleans, Era of Good Feelings, Monroe, John Quincy Adams, Adams-Onis Treaty, Monroe Doctrine, early industrialism/manufacturing, market revolution, cotton gin, Eli Whitney, deskilling, mutual-aid society, unions, boom-bust cycle, corrupt bargain, Tariff of Abominations (1828), Andrew Jackson, Panic of 1837, Indian Removal Act, Cherokee Nation v. Georgia, Trail of Tears, Treaty of New Echota, Second Seminole War, spoils system, Nullification crisis, Ordinance of Nullification, Force Bill, cult of domesticity, separate spheres, Democrats, National Republicans, Whig Party, Tallmadge Amendment, Jackson's Bank veto, Jacksonian Democracy, specie circular, pet, penny presses, Black Hawk War, Anti-Masonic Party, Alamo, Annexation of Texas, Texas statehood, Tariffs 1833 & 1842, Russo-American Treaty, Second Great Awakening, transcendentalism, Hudson River School, temperance, nativist, utopian societies, abolitionists, Liberator, Frederick Douglass, American Anti-Slavery Society, Sarah Grimke, Angelina Grimke, William Lloyd Garrison, come outer movement, North Star, Declaration of Sentiments, Elizabeth Cady Stanton, Lucretia Mott, Free Soil Party, Liberty Party, Ralph Waldo Emerson, Seneca Falls Convention, Susan B. Anthony, Horace Mann, Sojourner Truth, Brigham Young & Mormons, Lowell Textile Mills, Dorothea Dix, Amistad, Nat Turner's Rebellion, white supremacy, yeoman

- Develop counterclaim/refuting argument historical thinking and writing development skills.
- Develop historical analysis skills, including: inquiry, comparison, continuity & change over time, causation, corroboration, revising a claim, and synthesis.
- Develop speaking and listening skills.
- Develop student skills: time management and how to study effectively.
- Develop visual analysis of primary source images and political cartoons analysis skills.

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farmers, McCulloch v. Maryland, Cohens v. Virginia, Gibbons v. Ogden, Fletcher v. Peck, Dartmouth v. Woodward, Treaty of Wampanoag

Common Student Misconceptions for this Unit

Students might mistakenly believe:

- Presidents (and the executive branch) were always intended to be the most powerful branch of government.
- American Indians were predestined to be conquered by Americans.
- American Indians were only victims in U.S. history, misunderstanding that at times they were aggressors and some even slave holders.
- Industrialization in the U.S. happened only after the Civil War.

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Unit Assessment

Performance Assessment

Task Overview: (directions for teachers, including what the task is, how it's authentic, how it might be differentiated, materials, etc.)

Students will write a DBQ essay intended to replicate the College Board DBQ essay on the AP US History Exam in May. Students will be given a full class period to write their DBQ essay (as close to 60 minutes as possible) and three of the seven documents in advance of the DBQ essay assessment to annotate, determine main idea, CAPP, etc. The Period 4 multiple choice and short answer quizzes will be incorporated into the next unit's Period 5 (1844-1877) assessments in an effort to add an additional day of class learning activities. Additionally, students will participate in their first Socratic Seminar about antebellum reform movements using a released College Board DBQ essay prompt. This is intended to strengthen speaking and listening skills, but also to provide students the opportunity to strengthen DBQ skills in a speaking/listening format rather than a written format. The goal is for students to model and see/hear the modeling of important DBQ skills.

Differentiation occurs in class on a daily basis through flexible groupings and individualized or small group instruction embedded within the class learning activities. Also, student generated questions and choice of topics/supporting

Other (Formative, quizzes, tests, etc.)

- CAPP, document grouping, planning, and organizing for a practice DBQ essay prompt.
- Students will complete in class practice multiple choice, short answer, and DBQ essay responses in class assessments and ones provided in College Board's AP Classroom and the *Fabric of a Nation* textbook.
- Class activities and homework that focus on essay prompt dissection, thesis writing, essay planning, primary and secondary source reading & analysis, short answer response practice, and multiple choice practice.
- Formative assessments involving prompt dissection, thesis development, essay planning & category development, document groupings, and corroborative support are completed in class within flexible groups and presented to classmates for critical friend and teacher feedback.
- Class activities and homework that focus on complex historical analysis, primary and secondary source document analysis, causation, continuity & change, comparison, synthesis, visual analysis, thematic connections, corroboration, and counterclaims. Graphic organizers to support, include:

APPARTS Document Analysis

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content to discuss during the antebellum reform movements Socratic Seminar provides an additional layer of differentiation.

Student Directions: (link to Google document that will be given to students)

[Period 4 \(1800-1848\) DBQ Essay A](#)

[Period 4 \(1800-1848\) DBQ Essay A Documents](#)

[Period 4 \(1800-1848\) DBQ Essay B](#)

[Period 4 \(1800-1848\) DBQ Essay B Documents 1 & 2](#)

[Period 4 \(1800-1848\) DBQ Essay B Documents 3 & 4](#)

[Period 4 \(1800-1848\) DBQ Essay B Documents 5, 6, & 7](#)

[Period 4 \(1800-1848\) DBQ Essay C](#)

[Period 4 \(1800-1848\) DBQ Essay C Documents](#)

[DBQ Essay Response Rubric](#)

[Antebellum Socratic Seminar Graphic Organizer Planner and Reflection](#)

[Antebellum Socratic Seminar College Board Documents](#)

[Socratic Seminar Partner Observation Form](#)

[FLOAT Speaking & Listening Rubric for Socratic Seminars](#)

[CAPP Document Analysis](#)

[Causation](#)

[Comparison \(Two Developments\)](#)

[Comparison \(Three Developments\)](#)

[Continuity & Change Over Time](#)

[Secondary Source Text Comparisons](#)

[Synthesis](#)

[Visual Analysis Protocol](#)

[Eight Themes of APUSH](#)

- Class activities and assessments focus on numerous Portrait of the Graduate characteristics and attributes and students will reflect on their own specific POG characteristic and attribute performance and set future learning progression goals for themselves for the [Antebellum Socratic Seminar](#).

Supplemental Materials and Resources

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Texts		
Required Texts		
Title	Author	Rationale
<i>Fabric of a Nation</i> , 2024 (Module 4)	Jason Stacy & Matthew Ellington	To provide an additional perspective about the antebellum period so students can analyze multiple perspectives. Also, to provide students with practice analyzing both primary and secondary sources. Primary sources include: Page 262: William Clark, Journal Entry, October 1804, Alexis de Tocqueville, Letter to Louis de Kergorlay, 1831, Senator Rufus King, Speech to Congress on the Admission of Missouri to the U.S, 1819, Chief Tecumseh, <i>Address to the Governor William Henry Harrison</i> , 1810, President Monroe, <i>Monroe Doctrine</i> , 1823, Harriet Robinson, <i>Loom and Spindle of Life among the Early Mill Girls</i> , 1898, 1850 Census of the Isaac and Amy Post Household, Charles Finney, <i>An Influential Woman Converts</i> , 1830, Frederick Douglass, <i>Narrative of the Life of Frederick Douglass, an American Slave, Written by Himself</i> , 1845, Elizabeth Cady Stanton, <i>Declaration of Sentiments</i> , 1848, and Solomon Northup, <i>Twelve Years a Slave</i> , 1853.
Indian Removal Act 1830, Worcester v. Georgia (1830) U.S. Supreme Court ruling summary overturning the Indian Removal Act, Andrew Jackson, "To the Cherokee Tribe	Included with document titles	To provide complex, multiple perspectives about Indian removal in the 1830s.

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of Indians East of the Mississippi," March 16, 1835, Excerpt from the Treaty of New Echota, December 1835, Excerpt from the Constitutional Rights Foundation, "Division Among the Cherokees," 2021, A photograph of John Ross, Principal Chief of the Cherokee Nation from 1828 to his death in 1866, Gilder Lehrman Institute, Memorial and Protest of the Cherokee Nation," submitted to U.S. Congress 1836, Excerpt from General John E. Wool's Proclamation to the Cherokee, May 25, 1838, Russell Thornton, "Cherokee		
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Population Losses During the Trail of Tears,” Duke University Press, 1984, Ryan P. Smith, “How Native American Slaveholders Complicate the Trail of Tears Narrative,” <i>Smithsonian Magazine</i> , March 6, 2018.		
<u>Released DBQ prompt about antebellum reform movements</u>	College Board	To provide more complex perspectives about antebellum reform movements to support students’ Socratic Seminar and DBQ writing skill development.
<i>A People’s History of the United States</i> , “Chapter 6: The Intimately Oppressed”	Howard Zinn	To provide an additional perspective about women’s struggle for political, economic, and social agency during this time period so students can analyze multiple perspectives.
Suggested Texts		

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Learning Plan

Required Learning Activities

<i>In Order to Learn:</i>	<i>Students will:</i>
<p>Historical analysis, continuity & change, revolutionary change, and thesis writing, inquiry</p> <p>Communicator, Problem Solver, & Collaborator</p>	<ul style="list-style-type: none"> In collaborative groups, determine whether Jefferson & Jackson were revolutionary presidents by answering specific questions in a graphic organizer, ultimately answering the prompt: To what extent were Thomas Jefferson and Andrew Jackson revolutionary presidents?
<p>Historical Analysis, CAPP, revising a claim, causation, inquiry</p> <p>Empathizer, Communicator, & Collaborator</p>	<ul style="list-style-type: none"> Participate in a revising a claim activity centered around the class activity compelling questions using 10 Indian Removal in the 1830s docs answering the prompt: <i>How should Indian removal in the 1830s be remembered?</i>
<p>Historical analysis, causation, comparison & thesis writing, inquiry</p> <p>Collaborator, Communicator, & Problem Solver</p>	<ul style="list-style-type: none"> In collaborative groups, evaluate whether judicial or executive power expanded more from 1800-1848.
<p>Historical analysis & causation, inquiry</p> <p>Problem Solver, Collaborator</p>	<ul style="list-style-type: none"> Analyze the extent of the impacts of War of 1812 by collaboratively completing a graphic organizer.

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<p>Historical analysis, causation, continuity & change, comparison, thesis writing, inquiry</p> <p>Problem Solver, Communicator, Collaborator, & Empathizer</p>	<ul style="list-style-type: none"> Working in collaborative groups, analyze the impact westward expansion had on ONE the following: Native Americans, sectionalism, immigrants, growth of market economy, and technological advances, ultimately answering the prompt: <i>How did westward expansion fundamentally change America?</i> Working in collaborative groups, analyze the impact westward expansion had on democracy and democratic ideas, answering the prompt: <i>Did westward expansion lead to an expansion of democracy and democratic ideals?</i>
<p>Historical analysis, causation, continuity & change, comparison, thesis writing, CAPP, and speaking and listening, inquiry</p> <p>Problem Solver, Communicator, Collaborator, Empathizer, & Planner</p>	<ul style="list-style-type: none"> Using a College Board DBQ released prompt and documents, participate in a Socratic Seminar (fishbowl) demonstrating speaking and listening skills while modeling DBQ analysis and supporting document skills based on the prompt: <i>To what extent did antebellum reform movements lead to an expansion of democracy and democratic ideals?</i>
Suggested Learning Activities	
<i>In Order to Learn:</i>	<i>Students will:</i>
	Suggested learning activities included in College Board's <u>AP United States History Course Description</u>
<p>Time management and study skills</p> <p>Planner & Communicator</p>	<ul style="list-style-type: none"> Self-reflection on time management and study skills.
<p>Historical analysis, synthesis, corroboration.</p> <p>Communication</p>	<ul style="list-style-type: none"> Strengthen historical synthesis skills by making, explaining, and corroborating a synthesis connection to the Nat Turner's Rebellion.

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Revision History

Revision Date	Explanation of change(s) made to document

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Grade/Subject	10/AP US History
Unit Title	Period 5 (1844-1877)
Overview of Unit	This unit's scope starts with the election of President Polk, whose time in office involved war, western expansion, and ensuing debates about slavery. It ends with the Compromise of 1877, a compromise that ushered President Hayes into office and, simultaneously, the formal end of military Reconstruction of the South. Emphasis in this unit is placed on the causes, outcomes, and long term political, economic, and social effects of the Civil War and Reconstruction. Key AP US themes explored in this unit include: American Identity; Geography & Environment; Migration & Settlement; Work, Exchange, & Technology; Power & Politics; American & the World; Social Structures; and Culture.
Pacing	10 class sessions

Background Information For The Teacher (Unit Overview)

Rationale:

Undoubtedly, the most significant existential crisis the United States faced was the Civil War. Exploring the Civil War and its aftermath, Reconstruction, allows students to explore why extreme conflicts evolve and the complicated ways they are resolved, involving numerous interest groups vying for their goals and agency. While students will focus on the revolutionary nature of the war and its aftermath as it more broadly applied American values, beliefs, and ideals and expanded citizenship, they will also explore how the revolutionary changes evoked widespread counter-revolutionary reactions and the legacy this still has today, particularly in racial and social justice issues. Students can also make connections to issues that have brought revolutionary changes in their own lifetimes and caused widespread counterreactions. Students will focus on the resilience, hope, and joy that enslaved people found as a means of enduring the conditions of slavery and reflect on the lessons they can apply

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about resilience, hope, and joy when confronting challenges in their own lives. Through inquiry-based activities and the vehicle of this unit's content, students will develop key historical analysis skills like contextualization, causation, comparison, continuity and change over time, primary and secondary source analysis, key multiple choice, short answer response, and long essay assessment strategies and skills, and key student skills like speaking and listening, writing reflection, time management, and study skills.

Additionally, College Board's AP United States History Course Description identifies the following important thematic and transferable student understandings to provide a rationale for this unit:

"The development of and debates about democracy, freedom, citizenship, diversity, and individualism shape American national identity, cultural values, and beliefs about American exceptionalism, and in turn, these ideas shape political institutions and society. Throughout American history, notions of national identity and culture have coexisted with varying degrees of regional and group identities. Creative expression, demographic change, philosophy, religious beliefs, scientific ideas, social mores, and technology shape national, regional, and group cultures in America, and these varying cultures often play a role in shaping government policy and developing economic systems. Debates fostered by social and political groups about the role of government in American social, political, and economic life shape government policy, institutions, political parties, and the rights of citizens. Diplomatic, economic, cultural, and military interactions between empires, nations, and peoples shape the development of America and America's increasingly important role in the world."

Key Learning/Big Ideas:

Per College Board AP U.S. History Course Description:

KC-5.1 The United States became more connected with the world, pursued an expansionist foreign policy in the Western Hemisphere, and emerged as the destination for many migrants from other countries.

KC-5.1.I Popular enthusiasm for U.S. expansion, bolstered by economic and security interests, resulted in the acquisition of new territories, substantial migration westward, and new overseas initiatives.

KC-5.1.II In the 1840s and 1850s, Americans continued to debate questions about rights and citizenship for various groups of U.S. inhabitants.

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KC-5.2 Intensified by expansion and deepening regional divisions, debates over slavery and other economic, cultural, and political issues led the nation into civil war.

KC-5.2.I Ideological and economic differences over slavery produced an array of diverging responses from Americans in the North and the South.

KC-5.2.II Debates over slavery came to dominate political discussion in the 1850s, culminating in the bitter election of 1860 and the secession of Southern states.

KC-5.3 The Union victory in the Civil War and the contested reconstruction of the South settled the issues of slavery and secession, but left unresolved many questions about the power of the federal government and citizenship rights.

KC-5.3.I The North's greater manpower and industrial resources, the leadership of Abraham Lincoln and others, and the decision to emancipate enslaved people eventually led to the Union military victory over the Confederacy in the devastating Civil War.

KC-5.3.II.i Reconstruction and the Civil War ended slavery, altered relationships between the states and the federal government, and led to debates over new definitions of citizenship, particularly regarding the rights of African Americans, women, and other minorities.

Essential Questions

Compelling Questions

- What does it mean to be an American?
- What causes civil war?

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- Do laws ensure societal change?
- How do the oppressed exude resistance, resilience, and hope?

Supporting Questions

- To what extent did the Mexican War impact America?
- How did westward expansion fundamentally change America?
- What caused the Civil War?
- Analyze the relative importance of the causes of the Civil War.
- Why did the North win the Civil War?
- What key battles and events determined the outcome of the Civil War?
- What is the legacy of the Civil War?
- What were the goals of Reconstruction?
- Was Reconstruction a failure?
- When did Reconstruction truly end?
- How did African American men and women exude resiliency and hope, collectively acting to subvert slavery?

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Core Content Standards	
Content Specific Standards (NGSS, SS Framework, CCS, etc.)	<ul style="list-style-type: none"> US.Inq.1.a, US.Inq.1.b, US.Inq.1.c, US.Inq.2.a, US.Inq.3.a, US.Inq.3.b, US.Inq.3.c, US.Inq.4.a, US.Inq.4.b, US.Inq.4.c, US.Inq.4.e US.His.16.a, US.Civ.13.a, US.Civ.5.a, US.Civ.14.a, US.His.7.a
CT Core Literacy Standards (non-ELA)	<ul style="list-style-type: none"> Literacy.RH.9-10.1, Literacy.RH.9-10.2, Literacy.RH.9-10.3, Literacy.RH.9-10.4, Literacy.RH.9-10.5, Literacy.RH.9-10.6, Literacy.RH.9-10.7, Literacy.RH.9-10.8, Literacy.RH.9-10.9, Literacy.RH.9-10.10 Literacy.WHST.9-10.1, Literacy.WHST.9-10.1a, Literacy.WHST.9-10.1b, Literacy.WHST.9-10.1c, Literacy.WHST.9-10.1d, Literacy.WHST.9-10.1e, Literacy.WHST.9-10.2, Literacy.WHST.9-10.2b, Literacy.WHST.9-10.2d, Literacy.WHST.9-10.2e, Literacy.WHST.9-10.4, Literacy.WHST.9-10.5, Literacy.WHST.9-10.9, Literacy.WHST.9-10.10 Literacy.SL.9-10.1, Literacy.SL.9-10.1a, Literacy.SL.9-10.1b, Literacy.SL.9-10.1c, Literacy.SL.9-10.1d, Literacy.SL.9-10.2, Literacy.SL.9-10.4, Literacy.SL.9-10.5, Literacy.SL.9-10.6
Portrait of the Graduate Characteristics	<ul style="list-style-type: none"> Collaborator Communicator Empathizer Problem Solver Planner
CELP Standards	<ul style="list-style-type: none"> Construct meaning from oral presentations and literary and informational text through grade-appropriate listening, reading, and viewing Participate in grade-appropriate oral and written exchanges of information, ideas, and analyses, responding to peer, audience, or reader comments and questions

REGION 5 UNIT ORGANIZER

- Speak and write about grade-appropriate complex literary and informational texts and topics
- Construct grade-appropriate oral and written claims and support them with reasoning and evidence
- Conduct research and evaluate and communicate findings to answer questions or solve problems
- Analyze and critique the arguments of others orally and in writing
- Adapt language choices to purpose, task, and audience when speaking and writing
- Determine the meaning of words and phrases in oral presentations and literary and informational text
- Create clear and coherent grade-appropriate speech and text
- **Make accurate use of standard English to communicate in grade appropriate speech and writing**

K-U-D

UNDERSTANDS

Students will understand that:

- New land and economic acquisitions can be a source of conflict, particularly about who should benefit from the new resources.
- The issue of slavery caused significant conflict in the United States.
- Enslaved peoples exuded resiliency and hope, and collectively acted to subvert slavery.
- Economic resources and assets contribute significantly to the outcome of war.

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- The legacy of racial inequality has been a continuity in United States History.
- Different groups (e.g. branches of government and political/socio-economic groups) have different goals and define success differently.

KNOW

- Terms such as:

Oregon Trail, California gold rush, Californios, Liberty Party, Manifest Destiny, Treaty of Guadalupe Hidalgo, Mexican-American War, Wilmot Proviso, Missouri Compromise, Fugitive Slave Act of 1850, Compromise of 1850, Underground Railroad, Ostend Manifesto, Uncle Tom's Cabin, transcontinental railroad, Kansas-Nebraska Act, Dred Scott v. Sanford, American Party, Republican Party, Bleeding Kansas, John Brown's raid, Confederate States of America, Abraham Lincoln, Jefferson Davis, Crittenden Plan, Fort Sumter, contraband, Confiscation Acts, Battle of Shiloh, 1st & 2nd Battles of Bull Run, Antietam, Emancipation Proclamation, Enrollment Act, Women's National Loyal League, martial law, Copperheads, Gettysburg, Gettysburg Address, Vicksburg, Field Order #15, Sand Creek Massacre, Sherman's March to the Sea, 13th, 14th, & 15 Amendments, Appomattox Court House, Lincoln Assassination, Wade-Davis Bill, Harriet Tubman, Nineteenth, Reconstruction, Freedmen's Bureau, Radical Republicans, Black Codes, Military Reconstruction, scalawags, carpetbaggers, Tenure of Office Act, Andrew Johnson,

DO

- Develop Long Essay prompt dissection, thesis writing, planning, corroboration, and writing skills.
- Develop counterclaim/refuting argument historical thinking and writing development skills.
- Develop historical analysis skills, including: inquiry, comparison, continuity & change over time, causation, corroboration, revising a claim, and synthesis.
- Develop APUSH short answer quiz strategies.
- Develop APUSH multiple choice quiz strategies.
- Develop speaking and listening skills.
- Develop student self-reflection and goal setting in writing skills
- Develop student skills: time management and how to study effectively.

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Johnson's impeachment, American Equal Rights Association, National Woman Suffrage Association, sharecropping, Exodusters, Ku Klux Klan, Redeemers, Panic of 1873, Slaughterhouse cases, Great Railway Strike, US v. Cruikshank, Civil Rights Act of 1875, Ulysses S. Grant, Force Acts, Compromise of 1877

Common Student Misconceptions for this Unit

Students might mistakenly believe:

- All issues of racial inequality were resolved with the Civil War and Reconstruction.
- The Emancipation Proclamation freed enslaved peoples in the Union and Confederate states.
- The impeachment of President Johnson was for high crimes (rather than a political tactic of an opposing party).
- Impeachment means to remove a president (or high official) from office.
- Enslaved peoples didn't actively revolt or attempt to subvert slavery.
- The Democratic Party has always been the party of civil rights and racial equality.

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Unit Assessment

Performance Assessment

Task Overview: (directions for teachers, including what the task is, how it's authentic, how it might be differentiated, materials, etc.)

The three types of performance assessments included below are intended to replicate three of the four assessments students will complete on the College Board AP US History Exam in May. Students will be given the exact amount of time they will be given on the May exam (1 minute per multiple choice question, 13 minutes for the short answer quiz, and 40 minutes for the long essay). Students had been incrementally acclimated to the College Board time standards over the course of the first five of nine APUSH units.

Differentiation occurs in class on a daily basis through flexible groupings and individualized or small group instruction embedded within the class learning activities. Also, student generated questions and choice of topics/supporting content to discuss during the Reconstruction Socratic Seminar provides an additional layer of differentiation.

Student Directions: (link to Google document that will be given to students)

[Periods 4 & 5 Multiple Choice Quiz](#)

[Period 5 \(1844-1877\) Short Answer Quiz A](#)

[Period 5 \(1844-1877\) Short Answer Quiz B](#)

Other (Formative, quizzes, tests, etc.)

- Class activities and homework that focus on essay prompt dissection, thesis writing, essay planning, primary and secondary source reading & analysis, short answer response practice, and multiple choice practice.
- Formative assessments involving prompt dissection, thesis development, essay planning & category development, and corroborative support are completed in class within flexible groups and presented to classmates for critical friend and teacher feedback.
- Class activities and homework that focus on complex historical analysis, primary and secondary source document analysis, causation, continuity & change, comparison, synthesis, visual analysis, thematic connections, corroboration, and counterclaims. Graphic organizers to support, include:

[APPARTS Document Analysis](#)

[CAPP Document Analysis](#)

[Causation](#)

[Comparison \(Two Developments\)](#)

[Comparison \(Three Developments\)](#)

[Continuity & Change Over Time](#)

[Secondary Source Text Comparisons](#)

REGION 5 UNIT ORGANIZER

Period 5 (1844-1877) Short Answer Quiz C

Period 5 (1844-1877) Long Essay Prompts

Period 5 (1844-1877) Long Essay & Self Reflection

Long Essay Response Rubric

Reconstruction Socratic Seminar

Socratic Seminar Partner Observation Form

FLOAT Speaking & Listening Rubric for Socratic Seminars

Synthesis

Visual Analysis Protocol

Eight Themes of APUSH

- Student Self-Reflection Writing Graphic Organizer
- Class activities and assessments focus on numerous Portrait of the Graduate characteristics and attributes and students will reflect on their own specific POG characteristic and attribute performance and set future learning progression goals for themselves for the Reconstruction Socratic Seminar, Enslavement Resilience and Hope learning activity, and Period 5 Long Essay.

Supplemental Materials and Resources

- *Lincoln* (2012) movie
- *Rebel: Loreta Velazquez, Secret Soldier of the American Civil War* (2013)

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Texts			
Required Texts			
Title	Author	Rationale	Lexile Level (where applicable)
<i>Fabric of a Nation, 2024</i> (Module 5)	Jason Stacy & Matthew Ellington	To provide an additional perspective about the Civil War and Reconstruction period so students can analyze multiple perspectives. Also, to provide students with practice analyzing both primary and secondary sources. Primary sources include: President Polk, War Message, 1846, Abraham Lincoln, Spot Resolutions, 1847, John Calhoun, <i>The Clay Compromise Measures</i> , 1850, William Nell, <i>Meeting of Colored Citizens of Boston</i> , 1850, Abraham Lincoln, Speech at Edwardsville, 1858, Jefferson Davis, <i>Inaugural Address</i> , 1861, <i>The Charleston Mercury</i> , "President Lincoln and his Scheme of Emancipation 1862, Abraham Lincoln, Gettysburg Address, November 19, 1863, Abraham Lincoln, Second Inaugural Address, March 4, 1865, Colonel Whittlesey, <i>Report on the Freedmen's Bureau</i> , 1865, Elizabeth Cady Stanton, <i>Speech to the American Equal Rights Association</i> , 1869, Sharecropping Agreement, 1870, Abram Colby, a formerly enslaved Black person and Georgia state legislator, 1872.	

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Emancipation Proclamation	Abraham Lincoln	To provide students with the opportunity to analyze this primary source and determine how purpose and context impacted not only the words of the document, but also the course of the Civil War.	
Narrative of Arnold Gragston	National Humanities Center	To provide students with first hand accounts of enslavement that show resilience, hope, and joy.	
Letter to the Slaves of America	Fugitive Slave Law Convention, 1850	To provide students with first hand accounts of enslavement that show resilience and hope.	
Harriet Tubman	Debra Michaels, National Women's History Museum	To provide students with accounts of enslavement that show rebellion, resilience, and hope.	
<i>Soul of America</i> , "Chapter 2: The Long Shadow of Appomattox"	Jon Meacham	To provide an additional perspective about the Civil War and Reconstruction period so students can analyze multiple perspectives.	
Reconstruction the Revolution that Failed	James MacGregor Burns	To provide an additional perspective about the Reconstruction period so students can analyze multiple perspectives.	
Suggested Texts			

REGION 5 UNIT ORGANIZER

Learning Plan	
Required Learning Activities	
<i>In Order to Learn:</i>	<i>Students will:</i>
<p>Historical analysis, causation, thesis writing, inquiry</p> <p>Collaborator & Communicator</p>	<ul style="list-style-type: none"> In collaborative groups, create a thesis response to the prompt: <i>To what extent did the Mexican War impact America?</i>
<p>Historical analysis, causation, continuity & change, thesis writing, relative importance, primary source document analysis, corroboration, inquiry</p> <p>Communicator, Problem Solver, Collaborator</p>	<ul style="list-style-type: none"> In collaborative groups and analyzing a series of key Civil War lead up primary source documents, select which of the three thesis statements is the most accurate in identifying the cause of the Civil War. Ultimately, students will respond to the prompt: Analyze the relative importance of the causes of the Civil War.
<p>Historical analysis, causation, comparison, thesis writing, primary & secondary source document analysis, corroboration, inquiry</p> <p>Communicator, Problem Solver, Collaborator</p>	<ul style="list-style-type: none"> Working in collaborative groups, determine: <i>Why did the North win the Civil War?</i> and <i>What key battles and events determine the outcome of the Civil War?</i>
<p>Historical analysis, continuity & change, corroboration, thesis</p>	<ul style="list-style-type: none"> Working in collaborative groups, determine the legacy of the Civil War by completing the Continuity and Change graphic organizer.

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<p>writing, inquiry</p> <p>Communicator & Collaborator</p>	
<p>Historical analysis, causation, comparison, thesis writing, primary source document analysis, corroboration, inquiry</p> <p>Communicator, Empathizer, Collaborator</p>	<ul style="list-style-type: none"> Working in collaborative groups and analyzing primary source documents, answer the prompt: <i>How did African American men and women exude resiliency and hope, collectively acting to subvert slavery?</i>
<p>Historical analysis, comparison, continuity & change, primary source document analysis, corroboration, inquiry</p> <p>Communicator, Problem Solver, Collaborator</p>	<ul style="list-style-type: none"> Working in collaborative groups, determine what the goals of Reconstruction were and who were the winners and losers of Reconstruction (based on the specific groups (redeemer governments, freed African American men and women, Radical Republicans, executive branch).
<p>Historical analysis, causation, continuity & change, comparison, thesis writing, CAPP, and speaking and listening.</p> <p>Problem Solver, Communicator, Collaborator, Empathizer, & Planner</p>	<ul style="list-style-type: none"> Using the unit's primary and secondary source documents, participate in a Socratic Seminar (fishbowl) demonstrating speaking and listening skills while modeling DBQ analysis and supporting document skills based on the prompt: <i>Was Reconstruction a failure?</i>
<p>Historical analysis, continuity & change, comparison, and corroborative support, inquiry</p>	<ul style="list-style-type: none"> Working in collaborative groups, determine and support when Reconstruction truly ended (e.g. Civil Rights Acts of 1866 and/or 1875, Compromise of 1877, Civil Rights Act of 1964, Voting Rights Act of 1965, its ongoing)

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Problem Solver, Empathizer, Communicator, & Collaborator	
Suggested Learning Activities	
<i>In Order to Learn:</i>	<i>Students will:</i>
	Suggested learning activities included in College Board's <u>AP United States History Course Description</u>
Historical analysis, eight themes of APUSH, corroborative support. Communicator	<ul style="list-style-type: none"> ● Watch the <i>Lincoln</i> (2012) movie and determine which of the eight themes of APUSH appear in the film.
Historical analysis, corroborative support. Communicator & Empathizer	<ul style="list-style-type: none"> ● View and answer questions for documentary <i>Rebel: Loreta Velazquez, Secret Soldier of the American Civil War</i> (2013)

Revision History

Revision Date

Explanation of change(s) made to document

REGION 5 UNIT ORGANIZER

Grade/Subject	10/AP US History
Unit Title	Period 6 (1865-1898)
Overview of Unit	This unit's scope starts with the end date of the Civil War. Although it has a twelve year overlap with the end date of the previous unit, its thematic focus in those twelve years is different. While Period 5 (1844-1877) focuses more heavily on slavery, its legal end, the Civil War, and Reconstruction, Period 6 (1865-1898) thematically focuses heavily on industrialization and western expansion. Period 6 (1865-1898) ends just as the Spanish American War begins and the U.S. begins to rise on the world stage. Key AP US themes explored in this unit include: American Identity; Geography & Environment; Migration & Settlement; Work, Exchange, & Technology; Power & Politics; American & the World; Social Structures; and Culture.
Pacing	9 class sessions

Background Information For The Teacher (Unit Overview)

Rationale:

Exploring this Gilded Age U.S. industrialization and western expansion unit provides students with the opportunity to grapple with questions that are highly relevant and, at times, politically polarizing today, like: *How should wealth be distributed?* and *What role should the government play in the economy?* Students' answers will vary, providing them with an opportunity to engage in robust civic discourse. As students explore this unprecedented era of American economic growth, they will assess industrialism's positive and negative economic, political, and social impacts on various groups, and build a greater capacity for understanding the growing pains of countries in the midst of industrialization today. Students examine the push and pull factors that drove numerous groups to migrate westward, and the impact western expansion had on America as a whole and the peoples already inhabiting the West. This provides an opportunity for students to make connections to the push and pull factors that impact global migrations today. Through inquiry-based activities and the vehicle of this unit's content, students will develop key historical analysis

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skills like contextualization, causation, comparison, continuity and change over time, primary and secondary source analysis, key multiple choice, short answer response, and document-based essay assessment strategies and skills, and key student skills like speaking and listening, time management, and study skills.

Additionally, College Board's AP United States History Course Description identifies the following important thematic and transferable student understandings to provide a rationale for this unit:

"Push and pull factors shape immigration to and migration within America, and the demographic change as a result of these moves shapes the migrants, society, and the environment. The development of and debates about democracy, freedom, citizenship, diversity, and individualism shape American national identity, cultural values, and beliefs about American exceptionalism, and in turn, these ideas shape political institutions and society. Throughout American history, notions of national identity and culture have coexisted with varying degrees of regional and group identities. The interplay between markets, private enterprise, labor, technology, and government policy shape the American economy. In turn, economic activity shapes society and government policy and drives technological innovation. Social categories, roles, and practices are created, maintained, challenged, and transformed throughout American history, shaping government policy, economic systems, culture, and the lives of citizens. Debates fostered by social and political groups about the role of government in American social, political, and economic life shape government policy, institutions, political parties, and the rights of citizens."

Key Learning/Big Ideas:

Per College Board AP U.S. History Course Guide:

KC-6.1 Technological advances, large-scale production methods, and the opening of new markets encouraged the rise of industrial capitalism in the United States.

KC-6.1.I Large-scale industrial production— accompanied by massive technological change, expanding international communication networks, and pro-growth government policies—generated rapid economic development and business consolidation.

KC-6.1.II A variety of perspectives on the economy and labor developed during a time of financial panics and downturns.

KC-6.1.III New systems of production and transportation enabled consolidation within agriculture, which, along with periods of instability, spurred a variety of responses from farmers.

KC-6.2 The migrations that accompanied industrialization transformed both urban and rural areas of the United States and caused dramatic social and cultural change.

KC-6.2.I International and internal migration increased urban populations and fostered the growth of a new urban culture.

KC-6.2.II Larger numbers of migrants moved to the West in search of land and economic opportunity, frequently provoking competition and violent conflict.

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KC-6.3 The Gilded Age produced new cultural and intellectual movements, public reform efforts, and political debates over economic and social policies.

KC-6.3.I New cultural and intellectual movements both buttressed and challenged the social order of the Gilded Age.

KC-6.3.II Dramatic social changes in the period inspired political debates over citizenship, corruption, and the proper relationship between business and government.

Essential Questions

Compelling Questions

- What does it mean to be an American?
- How should wealth be distributed?
- What role should the government play in the economy?
- How do people increase their agency?

Supporting Questions

- What are the most important concepts of the Industrial Revolution?
- How did industrialization and western expansion change Americans' lives from 1865 to 1898?
- How were new immigrants treated differently than old immigrants?
- What role did nativism play in politics and society during the Gilded Age?
- What impact do inflation, deflation, depressions/panics, tariffs, and monetary policies have on the economy?
- Whose interests did the government serve during the Gilded Age?
- How did the Industrial Revolution impact minority groups?

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- How does our understanding of the role of women in society during the Industrial Age evolve and change over time?
- Were the Industrial Revolution industrial giants captains of industry or robber barons?
- To what extent did the Wilmington Massacre and Coup disrupt Black progress in the late nineteenth and early twenties centuries?
- How did the Exodusters create communities in the West and what is their legacy?

Core Content Standards	
Content Specific Standards (NGSS, SS Framework, CCS, etc.)	<ul style="list-style-type: none"> ● US.Inq.1.a, US.Inq.1.b, US.Inq.1.c, US.Inq.2.a, US.Inq.3.a, US.Inq.3.b, US.Inq.3.c, US.Inq.4.a, US.Inq.4.b, US.Inq.4.c, US.Inq.4.e ● US.His.4.a, US.Eco.12.a, US.His.10.a
CT Core Literacy Standards (non-ELA)	<ul style="list-style-type: none"> ● Literacy.RH.9-10.1, Literacy.RH.9-10.2, Literacy.RH.9-10.3, Literacy.RH.9-10.4, Literacy.RH.9-10.5, Literacy.RH.9-10.6, Literacy.RH.9-10.7, Literacy.RH.9-10.8, Literacy.RH.9-10.9, Literacy.RH.9-10.10 ● Literacy.WHST.9-10.1, Literacy.WHST.9-10.1a, Literacy.WHST.9-10.1b, Literacy.WHST.9-10.1c, Literacy.WHST.9-10.1d, Literacy.WHST.9-10.1e, Literacy.WHST.9-10.2, Literacy.WHST.9-10.2b, Literacy.WHST.9-10.2d, Literacy.WHST.9-10.2e, Literacy.WHST.9-10.4, Literacy.WHST.9-10.5, Literacy.WHST.9-10.9, Literacy.WHST.9-10.10 ● Literacy.SL.9-10.1, Literacy.SL.9-10.1a, Literacy.SL.9-10.1b, Literacy.SL.9-10.1c, Literacy.SL.9-10.1d, Literacy.SL.9-10.2, Literacy.SL.9-10.4, Literacy.SL.9-10.5, Literacy.SL.9-10.6
Portrait of the Graduate Characteristics	<ul style="list-style-type: none"> ● Collaborator ● Communicator ● Empathizer ● Problem Solver ● Planner

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CELP Standards

- Construct meaning from oral presentations and literary and informational text through grade-appropriate listening, reading, and viewing
- Participate in grade-appropriate oral and written exchanges of information, ideas, and analyses, responding to peer, audience, or reader comments and questions
- Speak and write about grade-appropriate complex literary and informational texts and topics
- Construct grade-appropriate oral and written claims and support them with reasoning and evidence
- Conduct research and evaluate and communicate findings to answer questions or solve problems
- Analyze and critique the arguments of others orally and in writing
- Adapt language choices to purpose, task, and audience when speaking and writing
- Determine the meaning of words and phrases in oral presentations and literary and informational text
- Create clear and coherent grade-appropriate speech and text
- Make accurate use of standard English to communicate in grade appropriate speech and writing

K-U-D

UNDERSTANDS

Students will understand that:

- Industrialization leads to significant economic impacts on all classes and subgroups within a society, albeit those impacts may be uneven.
- A government's actions, or inactions, have a significant impact on an economy.
- There are historic lessons to be learned from macroeconomic policies, as the circumstances and impacts of them will likely be repeated in history.

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- Issues surrounding immigration and of nativism recur in history.
- Government policies can favor some groups over others and corruption can play a role in government policy.
- While many aspects of women's lives have remained continuous in history, they have also evolved economically, socially, and politically.
- Push and pull factors drive people to migrate in search of better opportunities.

KNOW

- Terms such as :Great Plains, transcontinental railroad, Homestead Act, deflation, Grange, Comstock Lode, Gilded Age, Long Drive, Treaty of Fort Laramie, Treaty of Medicine Lodge, buffalo soldiers, Battle of Little Bighorn, Dawes Act, land rush, Ghost Dance, American Indian boarding schools, Mormons, Wounded Knee Massacre, Chinese Exclusion Act, New South, segregation, convict lease system, poll tax, Jim Crow Laws, *Plessy v. Ferguson*, gross domestic product, vertical integration, horizontal integration, robber barons, captains of industry, Vanderbilt, Edison, Carnegie, Rockefeller, J.P. Morgan, interlocking directorates, *Santa Clara County v. Southern Pacific Railroad Company*, trust, Sherman Antitrust Act, *U.S. v. E.C. Knight Company*, scientific management, labor unions, Knights of labor, collective bargaining, Haymarket riot, Homestead Strike, American Federation of Labor, Pullman Strike, Social Party, ghettos, Industrial Workers of the World (IWW), nativism, eugenics, melting pot, Turner frontier thesis, Exodusters, All Black Towns, Nicodemus, Wilmington Massacre & Coup, Red Shirts, Edward P. McCabe, Benjamin "Pap" Singleton, Frazier & Julia Baker, Ida B. Wells, tenements, sweatshops, settlement house (Hull), Jane Addams, Social Darwinism, laissez-faire, social gospel, women & bicycles, The Gospel of Wealth, Panic of 1873, Panic of 1893, Billion Dollar Congress, Interstate Commerce Commission (ICC), political machine, political boss,

DO

- Develop CAPP document analysis (Context-historical, Audience, Purpose, Point of View) skills.
- Develop Document-Based Question (DBQ) essay document grouping, planning, and writing skills.
- Develop counterclaim/refuting argument historical thinking and writing development skills.
- Develop historical analysis skills, including: inquiry, comparison, continuity & change over time, causation, corroboration, revising a claim, and synthesis.
- Develop speaking and listening skills.
- Develop effective essay prompt dissection skills.
- Develop APUSH short answer quiz strategies.
- Develop APUSH multiple choice quiz strategies.
- Develop student skills: time management and how to study effectively.
- Develop student self-reflection and goal setting in writing skills.

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Tammany Hall, Pendleton Civil Service Reform Act, Farmers Alliance, subtreasury system, Populists, Sherman Silver Purchase Act, Coxey's army, *Williams v. Mississippi*, Boss Tweed, Credit Mobilier Scandal, patronage/corruption, Gibson Girl, Samuel Gompers, Morrill Act, Victoria Woodhull, Tennessee Claflin, National American Women's Suffrage Association, Christian Women's Temperance Union, Eugene Debs, William McKinley, tariff, gold standard

Common Student Misconceptions for this Unit

Students might mistakenly believe:

- The American government acted in a completely laissez-faire manner during the Gilded Age.
- Only immigrants and white Americans migrated West during western expansion.
- All or most Black Americans were sharecroppers or poor laborers during the Gilded Age.
- All Black towns did not exist.
- The conquest and assimilation of American Indian tribes was predestined in American history.
- Women could not vote anywhere in the United States prior to the Nineteenth Amendment.

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Unit Assessment

Performance Assessment

Task Overview: (directions for teachers, including what the task is, how it's authentic, how it might be differentiated, materials, etc.)

The three types of performance assessments included below are intended to replicate three of the four assessments students will complete on the College Board AP US History Exam in May. Students will be given the exact amount of time they will be given on the May exam (1 minute per multiple choice question, 13 minutes for the short answer quiz, and 60 minutes for the DBQ essay). Students had been incrementally acclimated to the College Board time standards over the course of the first five of nine APUSH units. The Period 6 multiple choice and short answer quizzes and DBQ essay have been incorporated into the APUSH midterm exam in an effort to utilize the two class periods that would have been used for Period 6 assessments for additional instruction.

Differentiation occurs in class on a daily basis through flexible groupings and individualized or small group instruction embedded within the class learning activities. Also, students are assigned roles in the Industrialization and western expansion symposium based on their skill/the role complexity level which adds an additional layer of differentiation.

Other (Formative, quizzes, tests, etc.)

- CAPP, document grouping, planning, and organizing for a practice DBQ essay prompt.
- Students will complete in class practice multiple choice, short answer, and DBQ essay responses in class assessments and ones provided in College Board's AP Classroom and the *of a Nation* textbook.
- Class activities and homework that focus on essay prompt dissection, thesis writing, essay planning, primary and secondary source reading & analysis, short answer response practice, and multiple choice practice.
- Formative assessments involving prompt dissection, thesis development, essay planning & category development, document groupings, and corroborative support are completed in class within flexible groups and presented to classmates for critical friend and teacher feedback.
- Class activities and homework that focus on complex historical analysis, primary and secondary source document analysis, causation, continuity & change, comparison, synthesis, visual analysis, thematic connections, corroboration, and counterclaims. Graphic organizers to support, include:

APPARTS Document Analysis

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Student Directions: (link to Google document that will be given to students)

[Period 6 \(1865-1898\) Multiple Choice Quiz](#)

[Period 6 \(1865-1898\) Short Answer Quiz A](#)

[Period 6 \(1865-1898\) Short Answer Quiz B](#)

[Period 6 \(1865-1898\) Short Answer Quiz C](#)

[Period 6 \(1865-1898\) DBQ Essay Prompt A](#)

[Period 6 \(1865-1898\) DBQ Essay Documents A](#)

[Period 6 \(1865-1898\) DBQ Essay Prompt B](#)

[Period 6 \(1865-1898\) DBQ Essay Documents B](#)

[Prompt 6 \(1865-1898\) DBQ Essay Prompt C](#)

[Period 6 \(1865-1898\) DBQ Essay Documents C](#)

[DBQ Essay Response Rubric](#)

[Industrialism & Western Expansion Symposium](#)

[FLOAT Speaking & Listening Rubric](#)

[CAPP Document Analysis](#)

[Causation](#)

[Comparison \(Two Developments\)](#)

[Comparison \(Three Developments\)](#)

[Continuity & Change Over Time](#)

[Secondary Source Text Comparisons](#)

[Synthesis](#)

[Visual Analysis Protocol](#)

[Eight Themes of APUSH](#)

- [Student Self-Reflection Writing Graphic Organizer](#)
- Class activities and assessments focus on numerous Portrait of the Graduate characteristics and attributes.

Supplemental Materials and Resources

- The History Channel's *The Men Who Built America* series

Texts

Texts can be print, visual, film, etc.

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Required Texts

Title	Author	Rationale	Lexile Level (where applicable)
<i>Fabric of a Nation</i> , 2024 (Module 6)	Jason Stacy & Matthew Ellington	To provide an additional perspective about the Gilded Age and western expansion time period so students can analyze multiple perspectives. Also, to provide students with practice analyzing both primary and secondary sources. Primary sources include: Ida Lindgren, Swedish homesteader, August 25, 1874, Zitkala-Sa, <i>The School Days of an Indian Girl</i> , 1921, Henry Grady, <i>The New South</i> , 1886, <i>Chicago Tribune</i> , "The Telephone," December 12, 1880, U.S. Workforce by Industry in 1870 and 1900, John Morrison, <i>Testimony of a Machinist before the Senate Committee</i> , 1883, J Keppler, "Welcome to All!," <i>Puck</i> , 1880, Saum Song Bo, <i>A Chinese View of the Statue of Liberty</i> , 1885, United States Supreme Court, <i>Yick Wo v. Hopkins</i> , 1886, Jacob Riis, excerpts <i>How the Other Half Lives</i> , 1890, Sheet Music for Piano and Singers, "New York and Coney Island Cycle March: Two Step," 1896, Andrew Carnegie, "The Gospel of Wealth," 1889, "A Working Man's Prayer," <i>The Coming Nation</i> , 1894, Mary Elizabeth Lease, "A Nation of Inconsistencies," 1891, Bernhard Gillam, "Party of Patches: Grand Balloon Ascension—Cincinnati, May 20th, 1891," <i>Judge</i> ,	

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		1891	
<i>Soul of America</i> , "Chapter 3: With the Soul of Flame & Temper of Steel"	Jon Meacham	To provide an additional perspective about the Gilded and western expansion period so students can analyze multiple perspectives.	
"The Undimmed Appeal of the Gibson Girl," <i>American Heritage</i> , 1957	Agnes Rogers	To provide an nearly 70 year old perspective on women in the Gilded Age to help students understand when something is written impacts how it is written about.	
Primary source documents about the Wilmington coup and masacre, including: Norman Jennett*, "A Serious Question-How Long Will this Last?" <i>Raleigh News and Observer</i> , August 13, 1898, Georgian Women's Christian Temperance member and women's rights advocate Rebecca Latimer Felton, "Women on the Farm" speech excerpt,	numerous authors and sources- all specified in the left column	To provide students with primary and secondary sources to support their inquiry-based learning activity about the Wilmington coup and massacre—the only successful coup in United States history to date.	

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<p>August 11, 1897, Black Newspaper <i>Daily Record</i> Owner & Editor Alexander Manly, in response to Rebecca Latimer Felton</p> <p>"Women on the Farm" speech, August 18, 1898, Norman Jennett,</p> <p>"The Vampire that Hovers Over North Carolina," Raleigh <i>News and Observer</i>, September 27, 1898, Norman Jennett, "A Warning. Get Back! We Will not Stand It." Raleigh <i>News and Observer</i>, September 28, 1898, Former Confederate Colonel Alfred Moore Waddell, excerpt speech, Wilmington, NC, October 24, 1898, Red Shirts Photo</p>			
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<p>courtesy of N.C. Office of Archives & History, 1898, Telegram sent to President McKinley from North Carolina State Supreme Court Justice Thomas Settle and R.D. Douglas on November 10, 1898, Wilmington Light Infantry photo November 10, 1898, "America's Only Coup D'Etat," excerpt Southern Poverty Law Center, August 5, 2018, <i>Daily Record</i> 1898 photo courtesy of N.C. Office of Archives & History, "After the Negroes' Leaders," excerpt from <i>The Wilmington Messenger</i> newspaper, November 11, 1898, Wilmington Light Infantry and Naval Reserves members escort captured Blacks and Fusion leaders</p>			
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photo November 11, 1898 courtesy of N.C. Office of Archives & History, How the Only Coup D'Etat in U.S. History Unfolded," excerpt <i>NPR</i> , August 17, 2008, Population graph, Timothy B. Tyson, "The Ghosts of 1898: Wilmington's Race Riot and the Rise of White Supremacy," <i>Raleigh News and Observer</i> , November 17, 2006			
Suggested Texts			

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Learning Plan	
Required Learning Activities	
<i>In Order to Learn:</i>	<i>Students will:</i>
<p>Historical analysis, relative importance, and corroboration</p> <p>Communicator</p>	<ul style="list-style-type: none"> Identify and prioritize the most important concepts of the Industrial Revolution.
<p>Historical analysis, corroboration, research, speaking & listening, inquiry</p> <p>Empathizer, Communicator, Problem-Solver, Collaborator, & Planner</p>	<ul style="list-style-type: none"> After being assigned diverse industrialism-related roles, research their roles and participate in a class symposium responding to the prompt: <i>How did industrialization and western expansion change Americans' lives from 1865 to 1898?</i>
<p>Historical analysis, corroboration, comparison, continuity & change, thesis writing and supporting, inquiry</p> <p>Communicator, Problem-Solver, & Collaborator</p>	<ul style="list-style-type: none"> Determine the role the economic concepts: inflation, deflation, depressions/panics, tariffs, and monetary policies have on the economy. Working in collaborative groups, respond to the prompt: <i>Whose interests did the government serve during the Gilded Age?</i>
<p>Historical analysis, corroboration, causation, comparison, thesis writing and support, visual analysis, primary source analysis, inquiry</p>	<ul style="list-style-type: none"> Strengthen historical and visual analysis skills by analyzing the political cartoon "Looking Backwards" and answering the prompt: <i>What role did nativism play in politics and society during the Gilded Age?</i> In collaborative groups, determine responses to the prompts: <i>How did the Industrial Revolution impact minority groups?</i> and <i>How were new immigrants treated differently than old immigrants?</i>

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Communicator, Problem Solver, Collaborator	
<p>Historical analysis, corroboration, causation, comparison, thesis writing and support, visual analysis, primary source analysis, inquiry</p> <p>Communicator, Problem Solver, Collaborator</p>	<ul style="list-style-type: none"> Through an inquiry-based, primary source analysis, and revising the claim activity, in collaborative groups, students will determine an answer to the prompt: <i>To what extent did the Wilmington Massacre and Coup disrupt Black progress in the late nineteenth and early twenties centuries?</i>
<p>Historical analysis, corroboration, causation, comparison, thesis writing and support, visual analysis, primary and secondary source analysis, inquiry</p> <p>Empathizer, Communicator, & Problem Solver</p>	<ul style="list-style-type: none"> Through an inquiry-based, primary and secondary source analysis, students will determine an answer to the prompt: <i>How did the Exodusters create communities in the West and what is their legacy?</i>
<p>Historical analysis, contextualization, corroboration, comparison, continuity & change, thesis writing and support, secondary source analysis, inquiry</p> <p>Empathizer, Communicator, Collaborator, & Problem Solver</p>	<ul style="list-style-type: none"> In collaborative groups, compare historical journal article and secondary textbook portrayals of women in the Industrial Revolution from 2013 and 1957 and determine: <i>How does our understanding of the role of women in society during the Industrial Age evolve and change over time? (and the reasons why).</i>
<p>Historical analysis, corroboration, comparison, thesis writing and</p>	<ul style="list-style-type: none"> In collaborative groups, students will determine a response to the prompt: <i>Were the Industrial Revolution industrial giants captains of industry or robber barons?</i>

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support, primary and secondary source analysis, inquiry Communicator, Collaborator, & Problem Solver	
Suggested Learning Activities	
<i>In Order to Learn:</i>	<i>Students will:</i>
	Suggested learning activities included in College Board's <u>AP United States History Course Description</u>
Historical analysis, synthesis, corroboration. Communicator	<ul style="list-style-type: none"> Strengthen historical synthesis skills by making, explaining, and corroborating a synthesis connection to the McKinley Tariff.
Historical analysis, eight themes of APUSH, corroborative support. Communicator	<ul style="list-style-type: none"> Watch one or more episodes of The History Channel's <i>The Men Who Built America</i> series (2012) and determine which of the eight themes of APUSH appear in the episodes.
Time management and study skills Planner & Communicator	<ul style="list-style-type: none"> Complete self-reflection on time management and study skills.
Historical analysis, eight themes of APUSH, corroborative support. Communicator & Empathizer	<ul style="list-style-type: none"> Watch the film <i>Cabrini</i> (2024) and determine which of the eight themes of APUSH appear in the film.

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Revision History

Revision Date	Explanation of change(s) made to document

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Grade/Subject	10/AP US History
Unit Title	Period 7 (1890-1945)
Overview of Unit	This unit's scope starts with the date of the Sherman Antitrust Act, the U.S. government's first legal attempt to intervene in the economy to correct one consequence of industrialization, marking the beginning of the Progressive era. The unit concludes with the end of World War II in 1945. The two main focuses of this unit are the significant rise of the U.S. both economically and on the world stage to the level of superpower despite significant economic and foreign policy challenges. Key AP US themes explored in this unit include: American Identity; Geography & Environment; Migration & Settlement; Work, Exchange, & Technology; Power & Politics; American & the World; Social Structures; and Culture.
Pacing	19 class sessions

Background Information For The Teacher (Unit Overview)

Rationale:

It is impossible to understand America's economic status and prominence in the world today without this unit, so students exploring America's pivotal rise on the world stage and its transformation to an economic and military world superpower during this era is imperative. Students assess the reasons for and impacts of such transformational domestic and foreign policy growth and change. This allows students to weigh the benefits as well as costs of economic and foreign policy expectations and responsibilities and to make connections to issues today when America is often expected to assume a continued world leadership role. Along with the transformational economic, military, and foreign leadership growth during this time period, came a significant increase in federal government power, particularly in the executive branch. Students will assess the costs and benefits of this growth in federal power, making their own determinations as to the ideal levels of federal and presidential power in Americans' lives. Students will have the opportunity to choose a person or group of interest to them who experienced challenges during the Gilded Age, focusing on the resilience, hope, and joy they exuded despite their challenging circumstances and reflect on the lessons they can apply about

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resilience, hope, and joy in their own lives. Because students will select a medium of their choosing to showcase their research and analysis, it allows them to connect to this unit's content in a non-traditional way that is meaningful and personal to them. Through inquiry-based activities and the vehicle of this unit's content, students will develop key historical analysis skills like contextualization, causation, comparison, continuity and change over time, primary and secondary source analysis, key multiple choice, short answer response, and document-based essay assessment strategies and skills, and key student skills like effective research, speaking and listening, time management, and study skills.

Additionally, College Board's AP United States History Course Description identifies the following important thematic and transferable student understandings to provide a rationale for this unit:

"Diplomatic, economic, cultural, and military interactions between empires, nations, and peoples shape the development of America and America's increasingly important role in the world. Debates fostered by social and political groups about the role of government in American social, political, and economic life shape government policy, institutions, political parties, and the rights of citizens. Push and pull factors shape immigration to and migration within America, and the demographic change as a result of these moves shapes the migrants, society, and the environment. The interplay between markets, private enterprise, labor, technology, and government policy shape the American economy. In turn, economic activity shapes society and government policy and drives technological innovation. Push and pull factors shape immigration to and migration within America, and the demographic change as a result of these moves shapes the migrants, society, and the environment. Social categories, roles, and practices are created, maintained, challenged, and transformed throughout American history, shaping government policy, economic systems, culture, and the lives of citizens."

Key Learning/Big Ideas:

Per College Board AP U.S. History Course Description:

KC-7.1 Growth expanded opportunity, while economic instability led to new efforts to reform U.S. society and its economic system.

KC-7.1.I The United States continued its transition from a rural, agricultural economy to an urban, industrial economy led by large companies.

KC-7.1.II In the Progressive Era of the early 20th century, Progressives responded to political corruption, economic instability, and social concerns by calling for greater government action and other political and social measures.

KC-7.1.III During the 1930s, policymakers responded to the mass unemployment and social upheavals of the Great Depression by transforming the U.S. into a limited welfare state, redefining the goals and ideas of modern American liberalism.

KC-7.2 Innovations in communications and technology contributed to the growth of mass culture, while significant changes occurred in internal and international migration patterns.

KC-7.2.I Popular culture grew in influence in U.S. society, even as debates increased over the effects of culture on public values, morals, and American national identity.

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KC-7.2.II Economic pressures, global events, and political developments caused sharp variations in the numbers, sources, and experiences of both international and internal migrants.

KC-7.3 Participation in a series of global conflicts propelled the United States into a position of international power while renewing domestic debates over the nation's proper role in the world.

KC-7.3.I In the late 19th century and early 20th century, new U.S. territorial ambitions and acquisitions in the Western Hemisphere and the Pacific accompanied heightened public debates over America's role in the world.

KC-7.3.II World War I and its aftermath intensified ongoing debates about the nation's role in the world and how best to achieve national security and pursue American interests.

KC-7.3.III U.S. participation in World War II transformed American society, while the victory of the United States and its allies over the Axis powers vaulted the U.S. into a position of global, political, and military leadership.

Essential Questions

Compelling Questions

- What does it mean to be an American?
- How has the evolution of industrial capitalism changed America?
- What role should the government play in the economy?
- How do reformers change society?
- What makes reform movements successful?
- What role should the United States play on the world stage?
- Why do countries go to war?
- How do domestic and foreign crises impact people?

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Supporting Questions

- To what extent did Progressive reformers achieve their goals?
- How progressive were the suffragettes of Progressive Era?
- How progressive were the Progressives?
- To what extent did settlement houses support immigrants and understand their needs/perspectives?
- How were the Panic of 1893, Panic of 1907, and Great Depression similar? How were they different?
- How did Hoover's handling of the Great Depression compare to FDR's handling of the Great Depression?
- What were the three Rs of the New Deal?
- Were FDR's New Deal policies and programs effective enough in dealing with the numerous problems of the Great Depression?
- How did the evolution of industrial capitalism change American society in the 1890 to 1945 period?
- How did politicians and reformers respond to these changes and, in doing so, fundamentally expand the power of the federal government?
- Was American imperialism justified?
- Why did the U.S. fight in World War I and why was it hesitant to do so?
- Why didn't the U.S. join the League of Nations?
- How did the homefront contribute to American war efforts during World War I?
- What was the proper balance between liberty and security during World War I?

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- To what extent did isolationism grip post-World War I America, as seen in the debate over American acceptance of the Treaty of Versailles and League of Nations?
- To what extent was U.S. entry into WWII in 1941 a continuation in U.S. foreign policy (keep in mind the Dawes Plan, Kellogg-Briand Pact, Good Neighbor Policy, and the Neutrality Acts of 1935, 1936, and 1937)?
- How did the homefront contribute to American war efforts during World War II?
- What was the proper balance between liberty and security during World War II?
- Did America's role on the world stage from 1898-1945 represent more of a continuity or more of a change from its previous role in the world?
- Why does the U.S. go to war?
- How did the Tulsa Race Massacre contribute to generational economic loss?
- How should we remember Greenwood-Black Wall Street?
- What contributes to generational economic loss?
- What are contract buy mortgages and how did they contribute to generational economic loss?
- How did America transform its role on the world stage from 1890 to 1945?
- How did domestic and foreign events/movements impact various ethnic, racial, and social groups in American society?

Core Content Standards

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Content Specific Standards (NGSS, SS Framework, CCS, etc.)	<ul style="list-style-type: none"> ● US.Inq.1.a, US.Inq.1.b, US.Inq.1.c, US.Inq.2.a, US.Inq.3.a, US.Inq.3.b, US.Inq.3.c, US.Inq.4.a, US.Inq.4.b, US.Inq.4.c, US.Inq. 4.d, US.Inq.4.e ● US.His.4.a, US.His. 12.a, US.Eco.12.a, US.His.10.a, US.His.1.a, US.Civ.12.a, US.His.1.b, US.His.4.b, US.His.14.a, US.His.14.b, US.His.16.b, US.His.4.c, US.His.4.d, US.Civ.2.a, US.His.14.c, US.His.6.a, US.His.12.b, US.Eco.3.a, US.Eco.6.a, US.Eco.8.a, US.His.1.c, US.His.16.c, US.His.16.d, US.His.1.d, US.His.1.e
CT Core Literacy Standards (non-ELA)	<ul style="list-style-type: none"> ● Literacy.RH.9-10.1, Literacy.RH.9-10.2, Literacy.RH.9-10.3, Literacy.RH.9-10.4, Literacy.RH.9-10.5, Literacy.RH.9-10.6, Literacy.RH.9-10.7, Literacy.RH.9-10.8, Literacy.RH.9-10.9, Literacy.RH.9-10.10 ● Literacy.WHST.9-10.1, Literacy.WHST.9-10.1a, Literacy.WHST.9-10.1b, Literacy.WHST.9-10.1c, Literacy.WHST.9-10.1d, Literacy.WHST.9-10.1e, Literacy.WHST.9-10.2, Literacy.WHST.9-10.2a, Literacy.WHST.9-10.2b, Literacy.WHST.9-10.2c, Literacy.WHST.9-10.2d, Literacy.WHST.9-10.2e, Literacy.WHST.9-10.2f, Literacy.WHST.9-10.4, Literacy.WHST.9-10.5, Literacy.WHST.9-10.7, Literacy.WHST.9-10.8, Literacy.WHST.9-10.9, Literacy.WHST.9-10.10 ● Literacy.SL.9-10.1, Literacy.SL.9-10.1a, Literacy.SL.9-10.1b, Literacy.SL.9-10.1c, Literacy.SL.9-10.1d, Literacy.SL.9-10.2, Literacy.SL.9-10.4, Literacy.SL.9-10.5, Literacy.SL.9-10.6
Portrait of the Graduate Characteristics	<ul style="list-style-type: none"> ● Collaborator ● Communicator ● Empathizer ● Problem Solver ● Planner
CELP Standards	<ul style="list-style-type: none"> ● Construct meaning from oral presentations and literary and informational text through grade-appropriate listening, reading, and viewing ● Participate in grade-appropriate oral and written exchanges of information, ideas, and analyses, responding to peer, audience, or reader comments and questions

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- Speak and write about grade-appropriate complex literary and informational texts and topics
- Construct grade-appropriate oral and written claims and support them with reasoning and evidence
- Conduct research and evaluate and communicate findings to answer questions or solve problems
- Analyze and critique the arguments of others orally and in writing
- Adapt language choices to purpose, task, and audience when speaking and writing
- Determine the meaning of words and phrases in oral presentations and literary and informational text
- Create clear and coherent grade-appropriate speech and text
- Make accurate use of standard English to communicate in grade appropriate speech and writing

K-U-D

UNDERSTANDS

Students will understand that:

- Times of war and economic downturns tend to result in an expansion of government power, particularly of executive power.
- There are historic lessons to be learned from time periods of economic growth and economic decline, as the circumstances and impacts of them tend to be repeated in history.
- Debates about immigration have remained a continuity in history.
- While reformers have differing goals and achieved these goals to varying extents, overall they tend to have significant political, economical, and social impacts.
- Conservative and liberal economic policies tend to ebb and flow over time and are often a reaction to the level of success of previous

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economic policies.

- Debates about and acceptance of imperialism have remained a continuity in history.
- Countries typically go to war over national security concerns, economic interests, and national values/principles.
- Total war strategies have significant social, economic, political, and military impacts on a country.
- Debates about whether it is better to prioritize domestic interests or to engage in international organizations have been a continuity in history.
- Significant cultural and social changes occur throughout history and are often linked to migratory changes and increased interactions among various groups of people..
- National security tends to be prioritized over liberty in times of war.
- Military victory in war and economic success tend to increase a country's prestige and power in the world.
- War tends to create new opportunities for various social groups and can lead to civil rights reforms.
- Generational economic loss can have a significant impact on various social groups.

KNOW

Terms such as:

- **Domestic-** Progressives, muckrakers, Hull House, Jane Addams, *Muller v. Oregon*, National Association of Colored Women(NACW), Sheppard-Towner Act, feminists, National Women's Party, National American Woman Suffrage Association, Ida B. Wells Barnett, Alice Paul, Nineteenth Amendment, Booker T. Washington, W.E.B. Du Bois, Tuskegee Institute, Carter Woodson, National Association for the Advancement of Colored People (NAACP), fugitive pedagogy,

DO

- Develop student research skills, including: selecting a topic of interest, formulating an inquiry question to narrow research, finding, interpreting, and using online and print sources and databases that provide reputable, diverse, multiple, complex perspectives, organizing research into categories and corroborating supporting evidence, choosing and utilizing a medium to best convey findings and arguments, completing citations/works cited bibliography, and time management.

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Mary Church Terrell, Nannie Helen Burroughs, Addie W. Hunton, Eighteenth Amendment, Woman's Christian Temperance Union, Mann Act, Triangle Shirtwaist fire, conservationism, Department of Commerce & Labor, bully pulpit, Square Deal, Elkins Act, Upton Sinclair, *The Jungle*, Meat Inspection Act, Pure Food & Drug Act, Progressive Party, New Nationalism, New Freedom, Sixteenth Amendment, Adamson Act, Sherman Antitrust Act, Clayton Antitrust Act, Keating-Owen Act, TR & trust busting, Workmen's Compensation Act, Interstate Commerce Act, Seventeenth, Federal Reserve Act 1913, Teapot Dome scandal, flapper, Lost Generation, New Negro, Harlem Renaissance, Marcus Garvey, Scopes Monkey trial, Universal Negro Improvement Association, anti-foreignism, nativist, National Origins Act/Immigration Act of 1924, Sacco & Vanzetti case, Indian Citizenship Act, Ku Klux Klan, gangsterism, mass consumption, Ford, Tulsa Race Massacre, Viola Fletcher, Hughes Van Ellis, Red Summer, Margaret Sanger, Red Scare, Palmer Raids, Lanston Hughes, Black Tuesday, Great Depression, Hoobert Hoover, Smoot-Hawley Tariff, Reconstruction Finance Corporation (RFC), Agricultural Marketing Act, Dust Bowl, Scottsboro Nine, Bracero Program, Tydings-McDuffie Act, Bonus Army, New Deal, Franklin Delano Roosevelt, Emergency Banking Act, Glass Steagall Act, FDIC, Securities & Exchange Commission, Twenty-first Amendment, Agri. Adjustment Act, Public Works Admin., National Recovery Administration (NRA), Tennessee Valley Authority, Civilian Conservation Corps (CCC), Works Progress Admin (WPA), Social Security Act, Fair Labor Standards Act, Indian Reorganization Act, court-packing plan, Elenor Roosevelt, Mary McLeod Bethune, Father Coughlin, Francis Perkins, Mary McLeod Bethune, Keynesian economics, National Labor Relations Act, redlining, GI Bill

- Develop CAPP document analysis (Context-historical, Audience, Purpose, Point of View) skills.
- Develop Document-Based Question (DBQ) essay prompt dissection, thesis writing, document grouping, planning, corroboration, and writing skills.
- Develop counterclaim/refuting argument historical thinking and writing development skills.
- Develop historical analysis skills, including: inquiry, comparison, continuity & change over time, causation, corroboration, revising a claim, and synthesis.
- Develop APUSH short answer quiz strategies.
- Develop APUSH multiple choice quiz strategies.
- Develop speaking and listening skills.
- Develop student skills: time management and how to study effectively.
- Develop visual analysis of primary source image and political cartoon analysis skills.
- Develop APUSH writing self-reflection and goal setting skills.

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- **Foreign**-imperialism, jingoist, yellow journalism, Teller Amendment, U.S.S. Maine, Spanish American War, Rough Riders, Platt Amendment, Anti-Imperialist League, Emilio Aguinaldo, Filipino Insurrection, Boxer Rebellion, Roosevelt Corollary, Hay-Pauncefote Treaty, big stick policy, dollar diplomacy, Open Door policy, Good Neighbor policy, annexation of Hawaii, Panama Canal, Mexican Revolution, World War I, Central Powers, Allied Powers, *Lusitania*, unrestricted submarine warfare, Zimmerman telegram, Selective Service Act, Bolshevik Revolution, communism, Fourteen Points, League of Nations, Treaty of Versailles, Henry Cabot Lodge, Food Administration, War Industries Board, National War Labor Board, Fuel Administration, Railroad Administration, Espionage Act, Committee on Public Information, Sedition Act of 1918, American Protective League, Red Scare, *Schenck v. United States*, influenza pandemic, American Civil Liberties Union, Federal Bureau of Investigations, Great Migration, victory gardens, liberty bonds, Kellogg-Briand Pact, Third Reich, Nazism, Munich Accord, appeasement, isolationism, Neutrality Acts on 1935, 1936, 1937, 1939, America First Committee, Lend Lease Act, Selective Training & Service Act 1940, Tripartite Pact, Pearl Harbor, War Production Board, Tuskegee airmen, WACs, WAVES, Executive Order No. 8802, Double V, Navajo Code Talkers, zoot suit raids, Japanese American internment camps, Executive Order No. 9066, European Theater, Pacific Theater, D-Day, island hopping, Battle of Midway, Battle of Iwo Jima, Battle of Okinawa, Yalta Agreement, Manhattan Project, bombings of Hiroshima & Nagasaki, Holocaust, Rosie the Riveter, Potsdam Conference, race to Berlin, VE Day, VJ Day

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Common Student Misconceptions for this Unit

Students might mistakenly believe:

- President Hoover took no action to remedy the negative effects of the Great Depression.
- All of President Roosevelt's New Deal policies were successful and went unchallenged.
- The United States did not engage in imperialism.
- The United States was neutral before World War I and World War II.
- Since President Wilson promoted freedom and democracy in his Fourteen Points, he was a supporter of civil rights.
- Suffragettes like Alice Paul were inclusive of all women in their movement.
- Women could not vote anywhere in the United States prior to the Nineteenth Amendment.
- Suffragettes picketed and marched in parades, but did not face legal and physical consequences of the efforts.
- Debates about immigration are limited to the present day.
- Debates about whether the U.S. should focus its efforts domestically or on foreign policy are limited to the present day.
- Debates about whether to prioritize freedom or security are limited to the present day.
- All or most Black Americans were sharecroppers or poor laborers during the Period 7 (1890-1945) era.
- All Black towns did not exist.
- African Americans fought in integrated military regiments in World War I and World War II.
- Prohibition was only a limit on freedom (as opposed to being a legal success of the Women's Temperance Movement).
- Only non-U.S. citizens were relocated to Japanese American Internment Camps and the conditions in them were relatively comfortable.

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Unit Assessment

Performance Assessment

Task Overview: (directions for teachers, including what the task is, how it's authentic, how it might be differentiated, materials, etc.)

The three types of performance assessments included below are intended to replicate three of the four assessments students will complete on the College Board AP US History Exam in May. Students will be given the exact amount of time they will be given on the May exam (1 minute per multiple choice question, 13 minutes for the short answer quiz, and 60 minutes for the DBQ essay). Students had been incrementally acclimated to the College Board time standards over the course of the first five of nine APUSH units.

Differentiation occurs in class on a daily basis through flexible groupings and individualized or small group instruction embedded within the class learning activities. Also, student choice of topic, performance medium, and rubric criteria for the Resilience, Hope, and Joy project add additional layers of differentiation.

Student Directions: (link to Google document that will be given to students)

[Resilience, Hope, & Joy Student Choice Research Project](#)

[Resilience, Hope, & Joy Student Choice Research Project Rubric](#)

[Period 7 \(1890-1945\) Multiple Choice Quiz](#)

Other (Formative, quizzes, tests, etc.)

- CAPP, document grouping, planning, and organizing for a practice DBQ essay prompt.
- Students will complete in class practice multiple choice, short answer, and DBQ essay responses in class assessments and ones provided in College Board's AP Classroom and the *of a Nation* textbook.
- Class activities and homework that focus on essay prompt dissection, thesis writing, essay planning, primary and secondary source reading & analysis, short answer response practice, and multiple choice practice.
- Formative assessments involving prompt dissection, thesis development, essay planning & category development, document groupings, and corroborative support are completed in class within flexible groups and presented to classmates for critical friend and teacher feedback.
- Class activities and homework that focus on complex historical analysis, primary and secondary source document analysis, causation, continuity & change, comparison, synthesis, visual analysis, thematic connections, corroboration, and counterclaims. Graphic organizers to support, include:
[APPARTS Document Analysis](#)

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Period 7 (1890-1945) Short Answer Quiz A

Period 7 (1890-1945) Short Answer Quiz B

Period 7 (1890-1945) Short Answer Quiz C

Period 7 (1890-1945) DBQ Essay Prompt A

Period 7 (1890-1945) DBQ Essay Documents A

Period 7 (1890-1945) DBQ Essay Prompt B

Period 7 (1890-1945) DBQ Essay Documents B

Period 7 (1890-1945) DBQ Essay Prompt C

Period 7 (1890-1945) DBQ Essay Documents C

DBQ Essay Response Rubric

CAPP Document Analysis

Causation

Comparison (Two Developments)

Comparison (Three Developments)

Continuity & Change Over Time

Secondary Source Text Comparisons

Synthesis

Visual Analysis Protocol

Eight Themes of APUSH

- Student Self-Reflection Writing Graphic Organizer
- Class activities and assessments focus on numerous Portrait of the Graduate characteristics and attributes and students will reflect on their own specific POG characteristic and attribute performance and set future learning progression goals for themselves for the Resilience, Hope, & Joy Choice Research Project.

Supplemental Materials and Resources

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Texts			
Required Texts			
Title	Author	Rationale	Lexile Level (where applicable)
<i>Fabric of a Nation</i> , 2024 (Module 7)	Jason Stacy & Matthew Ellington	To provide an additional perspective about the 1890-1945 time when America rose to the level of economic and world superpower so students can analyze multiple perspectives. Also, to provide students with practice analyzing both primary and secondary sources. Primary sources include: Randolph & Owen, <i>The New Negro-What Is He?</i> , 1919, Ann Marie Low, <i>Dust Bowl Diary</i> , 1934, John Cachon, <i>Picket Line</i> , Chicago, 1941, FDR, <i>Message to Congress on Making the Civilian Conservation Corps a Permanent Agency</i> , 1937, Huey Long, <i>Every Man a King</i> , 1934, Albert Beveridge, <i>The March of the Flag</i> , 1898, President McKinely, <i>Remarks to a Methodist Delegation</i> , 1899, Eugene Debs, <i>Antiwar Speech in Canton, Ohio</i> , 1918, A. Mitchell Palmer, "The Case against the Reds," 1920, Charles Lindbergh, <i>Who Are the War</i>	

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		<p><i>Agitators?</i>, September 1941, Anonymous, "The Case of the Negro Officer in the U.S. Army," 1943, Charles Kikuchi, Diary Entry, 1942, Justice Hugo Black, <i>Korematsu v. United States</i>, 1944, Father Siemes, <i>Eyewitness Account of the Hiroshima Bombing</i>, 1945</p>	
<p>Suffragette primary & secondary sources, including: Nineteenth Amendment of the U.S. Constitution, "Ida B. Wells gets her due as a Black suffragist who rejected movement's racism," <i>The Washington Post</i>, August 25, 2020, "Fighting for the Vote with Cartoons," The New York Times, August 14, 2020, Excerpt from Josephine St. Pierre Ruffin's speech at the first conference of the National Association of Colored Women's Clubs, 1896, "A</p>	<p>U.S. Constitution, DeNeen L. Brown, Mary Ellen Sigsbee, Josephine St. Pierre Ruffin, Frances E.W. Harper, Sarah Pruitt</p>	<p>To provide a more complex understanding of the American suffragette movement and its level of inclusivity so students can analyze multiple perspectives. Also, to provide students with practice analyzing both primary and secondary sources.</p>	

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Double Standard," 1895, "The Night of Terror: When Suffragists Were Imprisoned and Tortured in 1917"			
Settlement houses primary & secondary sources, including: <i>The American Vision</i> - "The Social Gospel & The Settlement House Movement," <i>The Spirit of Youth and the City Streets</i> , 1909, <i>Dance Halls</i> 1911, <i>Twenty Years at Hull-House</i> 1910, <i>I Came a Stranger: The Story of a Hull-House Girl</i> , 1953	Appleby, J., Brinkley, A., Broussard, A., McPherson, J., & Ritchie, D, Jane Addams, Louise de Koven Bowen, Hilda Satt Polacheck	To provide an additional perspective about American urban settlement houses so students can analyze multiple perspectives. Also, to provide students with practice analyzing both primary and secondary sources.	
Practice DBQ essay prompts & documents about the effectiveness of the New Deal, Treaty of Versailles/League of Nations, and the 1890-1945 U.S. role on the world stage.	College Board	To provide students with the opportunity to analyze primary sources so students understand multiple perspectives and gain more complex understanding about the New Deal, U.S. responses to the post World War I era and the Treaty of Versailles/League of Nations, and the 1890-1945 U.S. role on the world stage.	

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<i>Events of Tulsa Disaster, 1921</i>	Mary Parrish	To provide students with the opportunity to analyze primary sources so students can understand multiple perspectives and gain a more complex understanding of the 1921 Tulsa Race Massacre.	
"Tulsa Grand Jury Report," 1921	<i>Tulsa World</i>	To provide students with the opportunity to analyze primary sources so students can understand multiple perspectives and gain a more complex understanding of the 1921 Tulsa Race Massacre.	
Primary source documents Tulsa Race Massacre, including: "A Squint at Negro Enterprise in that Land of Promise," 1911 photograph of John & Loula Williams, pre 1921 photograph of Greenwood district in Tulsa, "New Battle Now in Progress"-June 1, 1921, "Clear Street by Marshall Law"-June 2, 1921, "Dick Rowland is Freed of All Charges"- Oct. 15, 1921, "Riot Averted by Race Men in	Theo Baughman, Tulsa Historical Society and Museum, Smithsonian National Museum of African American History and Culture, <i>Tulsa Daily World</i> , <i>Tulsa Tribune</i> , <i>The Chicago Whip</i> , <i>The Tulsa Star</i> , Library of Congress, American National Red Cross Photograph Collection, <i>The Broad Ax</i> (Salt Lake City, UT),	To provide students with the opportunity to analyze primary sources so students can analyze multiple perspectives and gain a more complex understanding of the 1921 Tulsa Race Massacre.	

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Okmulgee" October 16, 1920, "Little Africa on Fire" photograph, "More Than Two Hundred White and Colored Men, Women and Children Were Killed in the Bloody or Horrible Race Riots at Tulsa, Okla."-June 18, 1921.			
Imperialism primary sources, including: <i>Address to the People of the United States 1898</i> , "White Man's Burden," 1899, The White Man's Burden political cartoons-1899, "A Lesson for Anti-expansionists"-1899, "A Red Letter Day"-1900, "Columbia's Easter Bonnet"-1901	Anti-imperialist League, Rudyard Kipling, <i>Judge Magazine</i> , <i>Life Magazine</i> , <i>Puck Magazine</i>	To provide students with the opportunity to analyze primary sources so students can gain a more complex understanding of American imperialism.	

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Lies My Teacher Told Me, Chapter 1: The Process of Hero-making	James Loewen	To provide an additional perspective about the 1890-1945 time when America rose to the level of economic and world superpower so students can analyze multiple perspectives.	
Wilson's "Address of President of the U.S. Delivered at Joint Session of Congress," -FDR's "A Day that Will Live in Infamy," AND -Bush's "9/11 Address to the Nation" speeches	Woodrow Wilson, Franklin D. Roosevelt, George W. Bush	To provide students with excerpts from speeches made by presidents advocating for war in different time periods so students can make historical comparisons and conclusions.	
<p style="text-align: center;">Suggested Texts <i>A menu of potential texts that fit the theme and scope of the unit; Should be varied genres and modes</i></p>			

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Learning Plan

Required Learning Activities

<i>In Order to Learn:</i>	<i>Students will:</i>
<p>Historical analysis, corroboration, causation, comparison, thesis writing and support, primary and secondary source analysis, inquiry</p> <p>Empathizer, Communicator, Problem Solver, & Collaborator</p>	<ul style="list-style-type: none"> In collaborative groups and using primary and secondary sources, determine <i>How progressive were the suffragettes of the Progressive Era?</i> Era?
<p>Historical analysis, corroboration, causation, comparison, thesis writing and support, primary and secondary source analysis, inquiry</p> <p>Empathizer, Communicator, Problem Solver, & Collaborator</p>	<ul style="list-style-type: none"> Using primary and secondary sources, determine <i>How progressive were the Progressives?</i> and To what extent did Progressive reformers achieve their goals? What makes a movement successful?
<p>Historical analysis, corroboration, causation, comparison, inquiry</p> <p>Communicator & Problem Solver</p>	<ul style="list-style-type: none"> Determine <i>How were the Panic of 1893, Panic of 1907, and Great Depression similar? How were they different?</i>
<p>Historical analysis, corroboration, causation, thesis writing and support, primary source analysis, inquiry</p>	<p>Analyze primary source documents in collaborative groups and construct/support a thesis in response to the prompt: <i>To what extent did settlement houses support immigrants and understand their needs/perspectives?</i></p>

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Empathizer, Communicator, Problem Solver, & Collaborator	
<p>Historical analysis, corroboration, causation, comparison, continuity & change, thesis writing and support, primary and secondary source analysis, inquiry</p> <p>Communicator, Problem Solver, & Collaborator</p>	<ul style="list-style-type: none"> In collaborative groups, respond to the prompts: <i>How did Hoover's handling of the Great Depression compare to FDR's handling of the Great Depression?</i> and <i>How did the evolution of industrial capitalism change American society from the Progressive Era through the Great Depression?</i> by constructing and supporting thesis statements.
<p>Historical analysis, corroboration, causation, comparison, continuity & change, thesis writing and support, primary and secondary source analysis, inquiry</p> <p>Planner, Problem Solver, Communicator, & Collaborator</p>	<ul style="list-style-type: none"> In collaborative groups, analyze primary source documents, construct & support a thesis, and plan a practice DBQ essay responding to the prompt: <i>Were FDR's New Deal policies and programs effective enough in dealing with the numerous problems of the Great Depression?</i>
<p>Historical analysis, corroboration, causation, comparison, continuity & change, primary and secondary source analysis, inquiry</p> <p>Empathizer, Problem Solver, Communicator, & Collaborator</p>	<ul style="list-style-type: none"> Analyze primary and secondary source documents and in collaborative groups, answer and support the following questions: <ul style="list-style-type: none"> <i>*How did the Tulsa Race Massacre contribute to generational economic loss?</i> <i>*How should we remember Greenwood-Black Wall Street?</i> <i>*How do post-World War II home ownership practices contribute to generational economic loss?</i>

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<p>Historical analysis, corroboration, comparison, continuity & change, primary source analysis, inquiry</p> <p>Empathizer, Problem Solver, Communicator, & Collaborator</p>	<ul style="list-style-type: none"> Analyzing primary source documents and in collaborative groups, answer and support the following question: Was American imperialism justified?
<p>Historical analysis, corroboration, causation, continuity & change, primary source analysis, inquiry</p> <p>Problem Solver, Communicator, & Collaborator</p>	<ul style="list-style-type: none"> Analyze the Sedition Acts of 1917 and 1918 and World War I War Production Board posters, in collaborative groups, formulate and support responses to the following prompts: <i>How did the homefront contribute to American war efforts during World War I?</i> and <i>What was the proper balance between liberty and security during World War I?</i>
<p>Historical analysis, corroboration, causation, thesis writing and support, primary and secondary source analysis, inquiry</p> <p>Planner, Problem Solver, Communicator, & Collaborator</p>	<ul style="list-style-type: none"> In collaborative groups, analyze primary source documents, construct & support a thesis, and plan a practice DBQ essay responding to the prompt: <i>Analyze the extent to which isolationism gripped post-World War I America, as seen in the debate over American acceptance of the Treaty of Versailles and League of Nations.</i>
<p>Historical analysis, corroboration, causation, synthesis, continuity & change, primary source analysis, inquiry</p> <p>Problem Solver, Communicator, & Collaborator</p>	<ul style="list-style-type: none"> In collaborative groups, analyze speech excerpts from Wilson's "Address of President of the U.S. Delivered at Joint Session of Congress," FDR's "A Day that Will Live in Infamy," AND Bush's "9/11 Address to the Nation" to make comparisons and synthesis connections in response to the prompt: <i>Why does the U.S. go to war?</i>
<p>Historical analysis, corroboration,</p>	<ul style="list-style-type: none"> In collaborative groups, formulate and support responses to the following prompts: <i>How did</i>

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continuity & change, causation, synthesis, thesis writing and support, inquiry Empathizer, Problem Solver, Communicator, & Collaborator	<i>domestic and foreign events/movements impact various ethnic, racial, and social groups in American society? and By the end of 1945 what does it mean to be an American?</i>
Historical analysis, corroboration, continuity & change, thesis writing and support, primary and secondary source analysis, inquiry Planner, Problem Solver, Communicator, & Collaborator	<ul style="list-style-type: none"> In collaborative groups, analyze primary source documents, construct & support a thesis, and plan a practice DBQ essay responding to the prompt: <i>Did America's role on the world stage from 1898-1945 represent more of a continuity or more of a change from its previous role in the world?</i>
Suggested Learning Activities	
<i>In Order to Learn:</i>	<i>Students will:</i>
	Suggested learning activities included in College Board's <u>AP United States History Course Description</u>
Time management and study skills Planner & Communicator	<ul style="list-style-type: none"> Self-reflect on time management and study skills.

Revision History

Revision Date

Explanation of change(s) made to document

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Grade/Subject	10/ AP US History
Unit Title	Period 8 (1945-1980)
Overview of Unit	This unit's scope starts with the end of World War II, from which the United States emerged as one of two superpowers and the only world nuclear power. The unit concludes with the election of Ronald Reagan and the shift of America from more liberal to more conservative politics. The unit focuses on the economic successes and challenges of the times as well as the Cold War era and its influence on society. Key AP US themes explored in this unit include: American Identity; Geography & Environment; Migration & Settlement; Work, Exchange, & Technology; Power & Politics; American & the World; Social Structures; and Culture.
Pacing	15 class sessions

Background Information For The Teacher (Unit Overview)

Rationale:

Dominated by an unrelenting commitment to containing communism and solidifying its global superpower status, students explore America's Cold War actions in this unit and analyze its effects on America socially, politically, economically, militarily, and culturally as well as its impacts on other countries. Additionally, students explore the residual effects that American Cold War policies have domestically and internationally today. This allows students to revisit their costs and benefits analysis of the expectations and responsibilities of American international intervention and make connections to issues today when America is often expected to assume a continued world leadership role. In the midst of a nuclear arms race and fears of a nuclear holocaust came significant and additional increases in presidential power. The mishandlings and abuses of which left many Americans feeling disillusioned with government overall and a contraction in presidential power. Students assess the expansion and contraction of presidential power, making their own determinations as to the ideal level of presidential power and influence in America. Students assess how voting and non-voting citizens impact America as numerous civil rights movements proliferated and inspired each other in this unit, collectively

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creating momentum toward the attainment of rights for a wider range of Americans to varying degrees. Seeds planted in previous time periods take root helping students realize that lasting change takes time. This unit is relatable to students because they have witnessed, and potentially participated in, numerous movements and organized civic actions in their own lifetimes (for or against U.S. actions and/or investments in the Israel/Hamas War, for or against pandemic restrictions, Black Lives Matter, March for Our Lives, #Metoo, etc.). Students have seen first hand that the work to attain many of the American values, beliefs, and rights is the work of many and, even as non-voters, have a role to play and agency in the United States. This country is theirs to mold and shape. The work of democracy is, therefore, ongoing and never done. Through inquiry-based activities and the vehicle of this unit's content, students will develop key historical analysis skills like contextualization, causation, comparison, continuity and change over time, primary and secondary source analysis, key multiple choice, short answer response, and long essay assessment strategies and skills, and key student skills like effective visual analysis, speaking and listening, time management, and study skills.

Additionally, College Board's AP United States History Course Description identifies the following important thematic and transferable student understandings to provide a rationale for this unit:

"Diplomatic, economic, cultural, and military interactions between empires, nations, and peoples shape the development of America and America's increasingly important role in the world. The development of and debates about democracy, freedom, citizenship, diversity, and individualism shape American national identity, cultural values, and beliefs about American exceptionalism, and in turn, these ideas shape political institutions and society. Throughout American history, notions of national identity and culture have coexisted with varying degrees of regional and group identities. The interplay between markets, private enterprise, labor, technology, and government policy shape the American economy. In turn, economic activity shapes society and government policy and drives technological innovation. Creative expression, demographic change, philosophy, religious beliefs, scientific ideas, social mores, and technology shape national, regional, and group cultures in America, and these varying cultures often play a role in shaping government policy and developing economic systems. Social categories, roles, and practices are created, maintained, challenged, and transformed throughout American history, shaping government policy, economic systems, culture, and the lives of citizens. Debates fostered by social and political groups about the role of government in American social, political, and economic life shape government policy, institutions, political parties, and the rights of citizens. Geographic and environmental factors, including competition over and debates about natural resources, shape the development of America and foster regional diversity. The development of America impacts the environment and reshapes geography, which leads to debates about environmental and geographic issues."

Key Learning/Big Ideas:

Per College Board AP U.S. History Course Description:

KC-8.1 The United States responded to an uncertain and unstable postwar world by asserting and working to maintain a position of global leadership, with far-reaching domestic and international consequences.

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KC-8.1.I United States policymakers engaged in a cold war with the authoritarian Soviet Union, seeking to limit the growth of Communist military power and ideological influence, create a free-market global economy, and build an international security system.

KC-8.1.II Cold War policies led to public debates over the power of the federal government and acceptable means for pursuing international and domestic goals while protecting civil liberties.

KC-8.2 New movements for civil rights and liberal efforts to expand the role of government generated a range of political and cultural responses.

KC-8.2.I Seeking to fulfill Reconstruction-era promises, civil rights activists and political leaders achieved some legal and political successes in ending segregation, although progress toward racial equality was slow.

KC-8.2.II Responding to social conditions and the African American civil rights movement, a variety of movements emerged that focused on issues of identity, social justice, and the environment.

KC-8.2.III Liberalism influenced postwar politics and court decisions, but it came under increasing attack from the left as well as from a resurgent conservative movement.

KC-8.3 Postwar economic and demographic changes had far-reaching consequences for American society, politics, and culture.

KC-8.3.I Rapid economic and social changes in American society fostered a sense of optimism in the postwar years.

KC-8.3.II New demographic and social developments, along with anxieties over the Cold War, changed U.S. culture and led to significant political and moral debates that sharply divided the nation.

Essential Questions

Compelling Questions

- What does it mean to be an American?
- What causes conflict?
- How can democracy expand?
- Who should have power?
- What should America's role be on the world stage?

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Supporting Questions

- What caused the Cold War?
- What is the containment policy?
- What is the domino theory?
- Was conflict between the U.S. & U.S.S.R. after World War II inevitable?
- How did the Korean War, Bay of Pigs Invasion, Cuban Missile Crisis, Construction of the Berlin Wall, Sputnik, Battle of Dien Bien Phu impact the Cold War?
- How did the Cold War affect American society?
- How do U.S. Cold War events in Iran, Guatemala, Congo, and Chile compare to U.S. Cold War events, in Korea, Cuba, Berlin, and the Suez Canal in the 1950s/1960s?
- What do images of the Civil Rights Movement reveal about its economic, political, and social realities?
- To what extent did the Civil Rights Movement achieve its goals?
- Were the ideas and actions of conservatives or liberals better for America in the 1960s?
- Who got it right about women's role in American society-Friedan or Schlafly?"
- What were the social, political, and economic realities of the 1960s/1970s Women's Movement?
- Analyze the ways did Americans Indians advocate for equity in the 1960s & 1970s and the extent they were successful.
- To what extent did the Civil Rights, Women's, American Indian, Chicano, Asian-American, and Gay Rights movement achieve their goals and change American society?
- Does a picture tell a whole story?
- Did America have the same role and prestige on the world stage after the Vietnam conflict?
- How did the Vietnam Conflict & Watergate affect the power of the president?
- How do the Nixon, Clinton, and Trump impeachment processes compare?
- How did Ford and Carter contribute to American disillusionment in the presidency?
- How did presidential power expand and contract from 1945-1980?

Core Content Standards

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Content Specific Standards (NGSS, SS Framework, CCS, etc.)	<ul style="list-style-type: none"> ● US.Inq.1.a, US.Inq.1.b, US.Inq.1.c, US.Inq.2.a, US.Inq.3.a, US.Inq.3.b, US.Inq.3.c, US.Inq.4.a, US.Inq.4.b, US.Inq.4.c, US.Inq.4.e ● US.His.14.d, US.His.14.e, US.His.1.f, US.His.5.a, US.Eco.13.a, US.His.16.e, US.His.5.b, US.His.15.a, US.Civ.5.b, US.Civ.5.c, US.His.11.a, US.His.1.g, US.His.1.h, US.His.15.b, US.Geo.3.a
CT Core Literacy Standards (non-ELA)	<ul style="list-style-type: none"> ● Literacy.RH.9-10.1, Literacy.RH.9-10.2, Literacy.RH.9-10.3, Literacy.RH.9-10.4, Literacy.RH.9-10.5, Literacy.RH.9-10.6, Literacy.RH.9-10.7, Literacy.RH.9-10.8, Literacy.RH.9-10.9, Literacy.RH.9-10.10 ● Literacy.WHST.9-10.1, Literacy.WHST.9-10.1a, Literacy.WHST.9-10.1b, Literacy.WHST.9-10.1c, Literacy.WHST.9-10.1d, Literacy.WHST.9-10.1e, Literacy.WHST.9-10.2, Literacy.WHST.9-10.2b, Literacy.WHST.9-10.2d, Literacy.WHST.9-10.2e, Literacy.WHST.9-10.4, Literacy.WHST.9-10.5, Literacy.WHST.9-10.9, Literacy.WHST.9-10.10 ● Literacy.SL.9-10.1, Literacy.SL.9-10.1a, Literacy.SL.9-10.1b, Literacy.SL.9-10.1c, Literacy.SL.9-10.1d, Literacy.SL.9-10.2, Literacy.SL.9-10.4, Literacy.SL.9-10.5, Literacy.SL.9-10.6
Portrait of the Graduate Characteristics	<ul style="list-style-type: none"> ● Collaborator ● Communicator ● Empathizer ● Problem Solver ● Planner
CELP Standards	<ul style="list-style-type: none"> ● Construct meaning from oral presentations and literary and informational text through grade-appropriate listening, reading, and viewing ● Participate in grade-appropriate oral and written exchanges of information, ideas, and analyses, responding to peer, audience, or reader comments and questions ● Speak and write about grade-appropriate complex literary and informational texts and topics ● Construct grade-appropriate oral and written claims and support them with reasoning and evidence

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- Conduct research and evaluate and communicate findings to answer questions or solve problems
- Analyze and critique the arguments of others orally and in writing
- Adapt language choices to purpose, task, and audience when speaking and writing
- Determine the meaning of words and phrases in oral presentations and literary and informational text
- Create clear and coherent grade-appropriate speech and text
- Make accurate use of standard English to communicate in grade appropriate speech and writing

K-U-D

UNDERSTANDS

Students will understand that:

- The class between communism and capitalism has caused significant conflict in the world.
- War and arms races have significant impacts on society.
- Images both capture and impact moments in history, often fueling reform movements.
- Liberal and conservative legislation, executive actions, and judicial decisions are cyclical in history and act as counter balances to each other.
- Social reform movements, even with varying goals and degrees of success, give momentum to and impact each other.
- Division within some social movements often hampers the achievement of movement goals.
- National security fears tend to expand government power, while government scandals and mishandling of developments tend to contract government power.
- People's disillusionment with a government can be long lasting and impactful.

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KNOW	DO
<p>Terms such as:</p> <p>Cold War, Potsdam Conference, containment, George Kennan, iron curtain, NATO, Warsaw Pact, totalitarianism, Truman Doctrine, Marshall Plan, Berlin Airlift, United Nations, Korean War, Fidel Castro, China's communist revolution, Cuba's communist revolution, Cuban Missile Crisis, Iranian coup, Guatemalan coup, HUAC, Second Red Scare, Federal Employee Loyalty Program, Truman, McCarthyism, GI Bill, Dixiecrats, Truman desegregated the military, baby boom, Levittown, redlining, Sun Belt, contract buy mortgages, suburbs, New Look, military-industrial complex, mutually assured destruction, non-alignment, Bandung Conference, Eisenhower Doctrine, Modern Republicanism, Sputnik, National Interstate & Defense Highway Act, Bureau of Indian Affairs, Operation Wetback, Bay of Pigs Invasion, Berlin Wall, <i>Brown v. Board of Ed. of Topeka</i>, SCLC, Little Rock Nine, Montgomery bus boycott, SNCC, Freedom Rides, Dr. Martin Luther King, March on Washington (1963), Civil Rights Act 1964, Freedom Summer, Edmund Pettus Bridge/Selma, Voting Rights Act of 1965, Black Power, Malcolm X, Stokely Carmichael, Black Panther Party, affirmative action, school busing, <i>Regents of University of California v. Bakke</i>, New Frontier, John F. Kennedy, Lyndon Johnson, Great Society, Medicare, Medicaid, EPA, Warren Court, Students for a Democratic Society, Free Speech Movement, counterculture, William F. Buckley, Young Americans for Freedom, Barry Goldwater, Sharon Statement, assassinations of Dr. King, Malcolm X, & Robert Kennedy, Richard Nixon, Gerald Ford, Twenty-Sixth Amendment, Six Day War, silent majority, Watergate, Jimmy Carter, Soviet invasion of Afghanistan, mujahideen, SALT I & II, Camp David Accords, Iran Hostage Crisis, deindustrialization, stagflation, New Right, neoconservatives, Christian Right, TV & teen culture, rock & roll, Beats, conformity, Betty Freidan, NOW, ERA, <i>Roe v. Wade</i>, <i>Dobbs v. Jackson</i></p>	<ul style="list-style-type: none"> ● Develop Long Essay prompt dissection, thesis writing, planning, corroboration, and writing skills. ● Develop counterclaim/refuting argument historical thinking and writing development. ● Develop historical analysis skills, including: inquiry, comparison, continuity & change over time, causation, corroboration, revising a claim, and synthesis. ● Develop APUSH short answer quiz strategies. ● Develop APUSH multiple choice quiz strategies. ● Develop Speaking and listening skills. ● Develop student self-reflection and goal setting in writing skills. ● Develop student skills: time management, how to study effectively, and long-term planning for a course culminating exam (Advanced Placement) .

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Women's Health Org., Gloria Steinem, Pauli Murray, Phyllis Schlafly, *The Feminine Mystique*, *Ms. Magazine*, *Griswold v. Connecticut*, Title IX, LULAC, Cesar Chavez, Dolores Huerta, La Raza Unida, Alcatraz Occupation, Wounded Knee Occupation, American Indian Movement, McCarran-Walter Immigration Act, Gay liberation movement, Stonewall riots, Vietnam war, domino theory, Ho Chi Minh, Ngo Diem, Viet Cong, Viet Minh, Dien Bien Phu, Gulf of Tonkin Resolution, My Lai massacre, Tet Offensive, Vietnamization, peace with honor, Kent State shootings, *Pentagon Papers*, War Powers Resolution, detente, Suez Crisis, secret bombings of Cambodia, Space Race, OPEC, Yom Kippur War, *Griggs v. Duke Power Co.*

Common Student Misconceptions for this Unit

Students might mistakenly believe:

- Impeachment means to remove a president or government official from office.
- President Nixon was impeached.
- Dr. Martin Luther King's non-violent, peaceful resistance was the only branch of the Civil Rights Movement.
- The Civil Right Movement was the only social reform movement of the time period.

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Unit Assessment	
Performance Assessment	Other (Formative, quizzes, tests, etc.)
<p>Task Overview: (directions for teachers, including what the task is, how it's authentic, how it might be differentiated, materials, etc.)</p> <p>The three types of performance assessments included below are intended to replicate three of the four assessments students will complete on the College Board AP US History Exam in May. Students will be given the exact amount of time they will be given on the May exam (1 minute per multiple choice question, 13 minutes for the short answer quiz, and 40 minutes for the long essay). Students had been incrementally acclimated to the College Board time standards over the course of the first five of nine APUSH units.</p> <p>Differentiation occurs in class on a daily basis through flexible groupings and individualized or small group instruction embedded within the class learning activities. Also, student generated questions and choice of topics/supporting</p>	<ul style="list-style-type: none"> • Class activities and homework that focus on essay prompt dissection, thesis writing, essay planning, primary and secondary source reading & analysis, short answer response practice, and multiple choice practice. • Formative assessments involving prompt dissection, thesis development, essay planning & category development, and corroborative support are completed in class within flexible groups and presented to classmates for critical friend and teacher feedback. • Class activities and homework that focus on complex historical analysis, primary and secondary source document analysis, causation, continuity & change, comparison, synthesis, visual analysis, thematic connections, corroboration, and counterclaims. Graphic organizers to support, include: <u>APPARTS Document Analysis</u>

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content to discuss during the 1950s-1980s movements for greater rights
Socratic Seminar provides an additional layer of differentiation.

Student Directions: (link to Google document that will be given to students)

[Period 8 \(1945-1980\) Multiple Choice Quiz](#)

[Period 8 \(1945-1980\) Short Answer Quiz A](#)

[Period 8 \(1945-1980\) Short Answer Quiz B](#)

[Period 8 \(1945-1980\) Short Answer Quiz C](#)

[Period 8 \(1945-1980\) Long Essay Prompt A](#)

[Period 8 \(1945-1980\) Long Essay Prompt B](#)

[Period 8 \(1945-1980\) Long Essay Prompt C](#)

[Long Essay Response Rubric](#)

[Movements for Greater Rights Socratic Seminar](#)

[Socratic Seminar Partner Observation Form](#)

[FLOAT Speaking & Listening Rubric for Socratic Seminars](#)

[CAPP Document Analysis](#)

[Causation](#)

[Comparison \(Two Developments\)](#)

[Comparison \(Three Developments\)](#)

[Continuity & Change Over Time](#)

[Secondary Source Text Comparisons](#)

[Synthesis](#)

[Visual Analysis Protocol](#)

[Eight Themes of APUSH](#)

- [Student Self-Reflection Writing Graphic Organizer](#)
- Class activities and assessments focus on numerous
Portrait of the Graduate characteristics and attributes and
students will reflect on their own specific POG
characteristic and attribute performance and set future
learning progression goals for themselves for the
[Movements for Greater Rights Socratic Seminar](#).

Supplemental Materials and Resources

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Texts			
Required Texts			
Title	Author	Rationale	Lexile Level (where applicable)
<i>Fabric of a Nation</i> , 2024 (Module 8)	Jason Stacy & Matthew Ellington	To provide an additional perspective about the 1945-1980 Cold War and Civil Rights eras so students can analyze multiple perspectives. Also, to provide students with practice analyzing both primary and secondary sources. Primary source documents include: Paul Robeson, Statement to Un-American Activities Committee, 1949, Restrictive Housing Covenant, St. Louis, Missouri, 1911, Dwight Eisenhower, Farewell Address, 1961, John Kennedy, <i>Address before the American Society of Newspaper Editors</i> , April 20, 1961, <i>The Southern Manifesto</i> , 1956, Ella Baker, "Bigger than a Hamburger," <i>Southern Patriot</i> , June 1960, Martin Luther King, Jr., "Letter from Birmingham Jail," April 1963, <i>Prospectus for the Mississippi Freedom Summer</i> , 1964, Michael Harrington, <i>The Other America</i> ,	

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		1962, Tom Hayden & others, "The Port Huron Statement," 1962, Richard Nixon, Address at Republican National Convention, 1968, Gloria Steinem, Testimony before Senate Judiciary Committee Hearing on the ERA, May 6, 1970, <i>The Phyllis Schlafly Report</i> , vol. 5, no. 7, February 1972, Dolores Huerta, Statement before Senate subcommittee on Migratory Labor, 1969, <i>Gulf of Tonkin Resolution</i> , 1964, Philip Caputo, <i>A Rumor of War</i> , 1977	
Cold War primary source readings: <i>Truman Doctrine & Marshall Plan</i>	Harry S. Truman & George C. Marshall	To strengthen student understanding of early U.S. Cold War policies and rationales.	
<i>Lies My Teacher Told Me</i> , Chapter 8: Watching Big Brother	James Loewen	To provide an additional perspective about lesser known Cold War events in Latin America, the Middle East, and Africa so students can analyze multiple perspectives.	
<i>Black Women's History of the United States: Auerlia's Lawsuit Against Jim Crow</i>	Daina Ramey Berry & Kali Nicole Gross	To provide an additional perspective about Black women's experiences during the Civil Rights Movement so students can analyze multiple perspectives.	

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Excerpts from <i>The Feminine Mystique</i>	Betty Freidan	To provide an additional perspective about women's experiences during the Cold War era so students can analyze multiple perspectives.	
<i>Duck & Cover-Bert the Turtle</i> (1952)	Archer Productions funded by U.S. Civil Defense Administration	To provide an additional perspective about Americans' (particularly children's) experiences during the Cold War era so students can analyze multiple perspectives.	
Daisy Girl Commercial	Democratic National Committee	To provide an additional perspective about LBJ's 1964 election campaign tactics and fears about nuclear war during the Cold War era so students can analyze multiple perspectives.	
"How the Chicano Movement Championed Mexican-American Identity and Fought for Change"	Karen Juanita Carrillo, history.com	To provide an additional perspective about the Chicano civil rights movement so students can analyze multiple perspectives.	
"Gay Rights" and "Stonewall Riots"	history.com 6/27/2017 & 6/26/2020	To provide an additional perspective about the Gay Rights Movement so students can analyze multiple perspectives.	
"The Imperial Presidency"	Arthur Schlesinger	To provide an additional perspective about the expansion and contraction of presidential power before and after Watergate so students can analyze multiple perspectives.	

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The First Immigrants: A survey of American Indian History documentary	LeeAnn Browett, youtube.com	To provide an additional perspective about American Indian experiences in U.S. History so students can analyze multiple perspectives.	
Watergate documentary	Dick Cavett	To provide students with a more complex understanding of Watergate.	
<p style="text-align: center;">Suggested Texts <i>A menu of potential texts that fit the theme and scope of the unit; Should be varied genres and modes</i></p>			

Learning Plan	
Required Learning Activities	
<i>In Order to Learn:</i>	<i>Students will:</i>
<p>Historical analysis, corroboration, causation, thesis writing and support, primary source analysis, inquiry</p> <p>Problem Solver, Communicator, & Collaborator</p>	<ul style="list-style-type: none"> In collaborative groups, analyze key Cold War documents (Truman Doctrine, Marshall Plan, political cartoons) in order to determine <i>What caused the Cold War?</i>

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<p>Historical analysis, corroboration, causation, body paragraph writing and support, primary source analysis</p> <p>Communicator, & Collaborator</p>	<ul style="list-style-type: none"> As a collaborative group, write a historically complex DBQ body paragraph using the Truman Doctrine and the Marshall Plan that begins with the following topic sentence: <i>American foreign policies in the late 1940s had a significant impact on the Cold War.</i> Body paragraph must include: the Truman Doctrine and Marshall Plan documents, CAPP, evidence beyond the docs, and historical complexity: corroboration, cause/effect, how/why, multiple perspectives, and synthesis (if logical), and a paragraph conclusion sentence.
<p>Historical analysis, corroboration, causation, essay planning, primary source analysis, inquiry</p> <p>Communicator, Planner, & Collaborator</p>	<ul style="list-style-type: none"> In collaborative groups and Keeping in mind the Truman Doctrine, Marshall Plan, containment policy, domino theory, Korean War, Bay of Pigs Invasion, Cuban Missile Crisis, Berlin Wall construction, Sputnik, the Suez Crisis, and Eisenhower's Farewell Address, determine <i>How the Cold War affected American society</i> by creating a thesis statement, and a plan for their essay response (including three categories, support, and a refuting argument).
<p>Historical analysis, comparison, corroboration, primary source analysis, inquiry</p> <p>Problem Solver, Collaborator, & Communicator</p>	<ul style="list-style-type: none"> Working in collaborative groups, respond to the prompt: <i>How do U.S. actions in Cold War events in Iran, Guatemala, Congo, and Chile compare to U.S. Cold War events, in Korea, Cuba, Berlin, and the Suez Canal in the 1950s/1960s?</i> using historical analysis skills and completing a comparison graphic organizer.
<p>Historical analysis, visual analysis, corroboration, primary source analysis, inquiry</p> <p>Problem Solver, Collaborator, & Communicator</p>	<ul style="list-style-type: none"> Work in collaborative groups and using a visual analysis protocol to interpret impactful Civil Rights Movement images and read source information, answer the prompt: <i>What do images/source information of the Civil Rights Movement reveal about its economic, political, and social realities?</i>

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<p>Historical analysis, comparison, corroboration, primary source analysis, inquiry</p> <p>Problem Solver & Communicator</p>	<ul style="list-style-type: none"> After reviewing 1960s primary and secondary source materials, respond to and support the prompt: <i>Were the ideas and actions of conservatives or liberals better for America in the 1960s?</i>
<p>Historical analysis, corroboration, causation, thesis writing and support, primary source analysis, inquiry</p> <p>Problem Solver, Communicator, & Collaborator</p>	<ul style="list-style-type: none"> After reviewing numerous 1960s & 1970s women's movement documents, in collaborative groups, respond to and support their answers to the prompts: <i>What were the social, political, and economic realities of the 1960s/1970s Women's Movement?</i> and <i>Who got it right about women's role in American society: Friedan or Schlafly?</i>
<p>Historical analysis, corroboration, causation, essay planning, primary source analysis, inquiry</p> <p>Communicator, Planner, & Collaborator</p>	<ul style="list-style-type: none"> Analyzing a series of American Indian Movement documents and in collaborative groups, answer the prompt: <i>Analyze the ways Americans Indians advocate for equity in the 1960s & 1970s and the extent they were successful.</i> Complete a Long Essay Planning graphic organizer, which includes a thesis statement and a plan for their essay response (including three categories, support, and a refuting argument).
<p>Historical analysis, causation, continuity & change, comparison, thesis writing, and speaking and listening, inquiry</p> <p>Problem Solver, Communicator, Collaborator, Empathizer, & Planner</p>	<ul style="list-style-type: none"> Participate in a Socratic Seminar centered around the following prompt: <i>To what extent did the Civil Rights, Women's, American Indian, Chicano, Asian-American, and Gay Rights movement achieve their goals and change American society?</i>
<p>Historical analysis, causation, continuity & change, comparison,</p>	<ul style="list-style-type: none"> In collaborative groups and using a visual analysis protocol and Vietnam image source information, answer the prompt: <i>Does a picture tell a whole story?</i>

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thesis writing, corroboration, inquiry Problem Solver, Communicator, & Collaborator	<ul style="list-style-type: none"> In collaborative groups, respond to and support their response to the prompt: <i>Analyze the extent America had the same role and prestige on the world stage after the Vietnam conflict.</i> Keeping in mind the Vietnam conflict, students will revisit their original collaborative groups responses to the prompt: <i>Analyze the extent the Cold War affected American society?</i> and support their revisions.
Historical analysis, causation, continuity & change, comparison, thesis writing, corroboration, inquiry Problem Solver, Communicator, & Collaborator	<ul style="list-style-type: none"> After watching Dick Cavett's <i>Watergate</i> and reading various primary and secondary sources about Watergate, in collaborative groups respond to and support their responses to the prompts: <i>How did the Vietnam Conflict & Watergate affect the power of the president?</i> and <i>How do the Nixon and Trump actions and impeachment processes compare?</i>
Historical analysis, causation, continuity & change, comparison, thesis writing, corroboration, inquiry Problem Solver, Communicator, & Collaborator	<ul style="list-style-type: none"> After analyzing various primary and secondary sources about the actions of presidents Ford and Carter and keeping in mind all unit content, in collaborative groups, respond to and support their responses to the prompts: <i>How did Ford and Carter contribute to American disillusionment in the presidency?</i> and <i>How did presidential power expand and contract from 1945-1980?</i>
Suggested Learning Activities	
<i>In Order to Learn:</i>	<i>Students will:</i>
	Suggested learning activities included in College Board's <u>AP United States History Course Description</u>
Time management & study skills Planner & Communicator	<ul style="list-style-type: none"> Self-reflection on time management and study skills.

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Time management & study skills Planner, Problem Solver, & Communicator	<ul style="list-style-type: none">● Create a plan to study for the College Board AP US History exam using monthly and weekly planning calendars. Self-reflect on past assessment performance to prioritize the skills and content they need to most study and the most effective ways to study.
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Revision History

Revision Date	Explanation of change(s) made to document

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Grade/Subject	10/AP US History
Unit Title	Period 9 (1980-present) & APUSH exam review
Overview of Unit	This unit's scope starts with the election of Ronald Reagan and the shift of America from more liberal to more conservative politics and continues through to present day American successes and challenges. The unit focuses on the economic successes and challenges of the times as well as the ending Cold War era, its influence on society, and broader U.S. international connectedness, cooperation, and conflicts. Key AP US themes explored in this unit include: American Identity; Geography & Environment; Migration & Settlement; Work, Exchange, & Technology; Power & Politics; American & the World; Social Structures; and Culture. Students complete numerous practice assessments in preparation for the College Board AP United States History exam. After the College Board exam in May, students strengthen their research skills by completing a research paper on a United States history topic of their choosing.
Pacing	26 class sessions

Background Information For The Teacher (Unit Overview)

Rationale:

This unit is essential because it is the culminating unit of the course where students, ideally, apply their understanding of the past to the present. While the previous unit was dominated by a clear foreign policy, students discover fluctuating foreign policies as Cold War policies revive and end, America transforms from a superpower to a unipower, and then the 9/11 attacks cause transformational change and America embarks on preemptive foreign policy interventions in the midst of a seemingly national security existential crisis. Following the increased disillusionment of the previous unit, America has a counter reactionary response to decades of liberal leaning policies, moving toward more conservative leaning policies. This allows students to question whether liberal or conservative policies are better to solve today's challenges, and students come to their own individual determinations. Globalization, and technological advances like the Internet, smartphones, social media, and AI, transform the economic,

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cultural, and social spheres, causing significant political impacts. America and its counterparts in the world face and attempt to address increasing political polarization that makes solving domestic and foreign issues all the more difficult. Combined, this is what students try to make sense of and navigate in our current era. Additionally, through inquiry-based activities and the vehicle of this unit's content, students will develop key historical analysis skills like contextualization, causation, comparison, continuity and change over time, primary and secondary source analysis, key multiple choice, short answer response, and document-based question essay assessment strategies and skills, and key student skills like effective visual analysis, speaking and listening, time management, and study skills. Students will self-select any topic in United States history of interest to them to focus their research and showcase their historical analysis and essay writing skills. Taking into consideration all they learned in the course, students will answer the course essential question "What does it mean to be an American?" in a dynamic class Socratic Seminar. While their responses are personalized, traditionally they include quintessential American values enshrined in our semiotic documents centuries ago like freedom, equality, and natural rights. They'll typically touch on ideals like the promises of a better life, multiculturalism, and the power of a people to mold and shape the country they inhabit through active, civic engagement—ideals that predate the founding of the United States itself. Students often apply this to their own lives, sharing their experiences openly with each other, creating meaningful, heart-felt exchanges that are truly inspiring.

Additionally, College Board's AP United States History Course Description identifies the following important thematic and transferable student understandings to provide a rationale for this unit:

"Debates fostered by social and political groups about the role of government in American social, political, and economic life shape government policy, institutions, political parties, and the rights of citizens. Diplomatic, economic, cultural, and military interactions between empires, nations, and peoples shape the development of America and America's increasingly important role in the world. The interplay between markets, private enterprise, labor, technology, and government policy shape the American economy. In turn, economic activity shapes society and government policy and drives technological innovation. Push and pull factors shape immigration to and migration within America, and the demographic change as a result of these moves shapes the migrants, society, and the environment."

Key Learning/Big Ideas:

Per College Board AP United States History Course Description:

KC-9.1 A newly ascendant conservative movement achieved several political and policy goals during the 1980s and continued to strongly influence public discourse in the following decades.

KC-9.1.I Conservative beliefs regarding the need for traditional social values and a reduced role for government advanced in U.S. politics after 1980.

KC-9.2 Moving into the 21st century, the nation experienced significant technological, economic, and demographic changes.

KC-9.2.I New developments in science and technology enhanced the economy and transformed society, while manufacturing decreased.

KC-9.2.II The U.S. population continued to undergo demographic shifts that had significant cultural and political consequences.

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KC-9.3 The end of the Cold War and new challenges to U.S. leadership forced the nation to redefine its foreign policy and role in the world.

KC-9.3.I The Reagan administration promoted an interventionist foreign policy that continued in later administrations, even after the end of the Cold War.

KC-9.3.II Following the attacks of September 11, 2001, U.S. foreign policy efforts focused on fighting terrorism around the world.

Essential Questions

Compelling Questions

- What does it mean to be an American?
- Why do conflicts de-escalate?
- What should America's role be on the world stage?
- What should the role of the government be?

Supporting Questions

- *How do the Period 9 presidents compare in terms of intervention in foreign affairs, portrayal in the media, legacy, and their impact on the role of the presidency?
- What impact have government scandals had on America?
- Are the ideas and actions of conservatives or liberals better for America?
- Why did the Reagan Revolution occur and what was its impact?

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- What is Reaganomics and did it work?
- In what way(s) has America as a whole moved toward conservatism since 1980 and why?
- What caused an increase in political polarization and how can that polarization be reversed?
- How should the government be held accountable to the people?
- How have technological advances transformed American society?
- Who deserves credit for ending the Cold War?
- How have globalization, protectionism, outsourcing, mechanization/automation, and AI impacted the U.S. economy?
- Were U.S. military interventions from the 1991 Persian Gulf War to the present more of a continuity or change from previous U.S. military interventions in the twentieth century?
- Analyze the extent foreign and domestic challenges have impacted and shaped America.
- What is the proper balance between national security and civil liberties?
- How and why has the role of government changed over time?
- To what extent have the twenty-first century reform movements achieved their goals?

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Core Content Standards	
Content Specific Standards (NGSS, SS Framework, CCS, etc.)	<ul style="list-style-type: none"> ● US.Inq.1.a, US.Inq.1.b, US.Inq.1.c, US.Inq.2.a, US.Inq.3.a, US.Inq.3.b, US.Inq.3.c, US.Inq.4.a, US.Inq.4.b, US.Inq.4.c, US.Inq.4.e ● US.His.1.h, US.His.2.a, US.His.15.b, US.Geo.3.a, US.Civ.13.b, US.His.2.b, US.His.2.c, US.His.14.f, US.His.5.c, US.Eco.8.b, US.Geo.12.a, US.Civ.10.a, US.Civ.14.b
CT Core Literacy Standards (non-ELA)	<ul style="list-style-type: none"> ● Literacy.RH.9-10.1, Literacy.RH.9-10.2, Literacy.RH.9-10.3, Literacy.RH.9-10.4, Literacy.RH.9-10.5, Literacy.RH.9-10.6, Literacy.RH.9-10.7, Literacy.RH.9-10.8, Literacy.RH.9-10.9, Literacy.RH.9-10.10 ● Literacy.WHST.9-10.1, Literacy.WHST.9-10.1a, Literacy.WHST.9-10.1b, Literacy.WHST.9-10.1c, Literacy.WHST.9-10.1d, Literacy.WHST.9-10.1e, Literacy.WHST.9-10.2, Literacy.WHST.9-10.2a, Literacy.WHST.9-10.2b, Literacy.WHST.9-10.2c, Literacy.WHST.9-10.2d, Literacy.WHST.9-10.2e, Literacy.WHST.9-10.2f, Literacy.WHST.9-10.4, Literacy.WHST.9-10.5, Literacy.WHST.9-10.7, Literacy.WHST.9-10.8, Literacy.WHST.9-10.9, Literacy.WHST.9-10.10 ● Literacy.SL.9-10.1, Literacy.SL.9-10.1a, Literacy.SL.9-10.1b, Literacy.SL.9-10.1c, Literacy.SL.9-10.1d, Literacy.SL.9-10.2, Literacy.SL.9-10.4, Literacy.SL.9-10.5, Literacy.SL.9-10.6
Portrait of the Graduate Characteristics	<ul style="list-style-type: none"> ● Collaborator ● Communicator ● Empathizer ● Problem Solver ● Planner

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CELP Standards

- Construct meaning from oral presentations and literary and informational text through grade-appropriate listening, reading, and viewing
- Participate in grade-appropriate oral and written exchanges of information, ideas, and analyses, responding to peer, audience, or reader comments and questions
- Speak and write about grade-appropriate complex literary and informational texts and topics
- Construct grade-appropriate oral and written claims and support them with reasoning and evidence
- Conduct research and evaluate and communicate findings to answer questions or solve problems
- Analyze and critique the arguments of others orally and in writing
- Adapt language choices to purpose, task, and audience when speaking and writing
- Determine the meaning of words and phrases in oral presentations and literary and informational text
- Create clear and coherent grade-appropriate speech and text
- Make accurate use of standard English to communicate in grade appropriate speech and writing

K-U-D

UNDERSTANDS

Students will understand that:

- Revolutions in thought often counteract previous developments and can have significant political, economic, and social outcomes.
- Liberal and conservative legislation, executive actions, and judicial decisions are cyclical in history and act as counter balances to each other.

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- Reform movements, even with varying goals and degrees of success, give momentum to and impact each other.
- The causes, results, and impacts of war can have significant impacts on people and the world.
- There are reasons and consequences of a country choosing to engage or not engage in world military conflicts.
- Government scandals impact the people of a country to varying degrees.
- There are causes and impacts of political polarization as well as ways to lessen its effects.
- Technological advances continue to transform the world and countries' economies.

KNOW

Ronald Reagan, Reagan Revolution, Supply-side economics, Reaganomics, Social conservatism, Immigration Reform & Control Act, AIDS, greenhouse gasses, Clean Air Act(1990), Americans with Disabilities Act(ADA), George H.W. Bush, sexual harassment, Anita Hill, Clarence Thomas, compassionate conservative, Mikhail Gorbachev, Glasnost, perestroika, Strategic Defense Initiative/Star Wars, START, Sandinistas, Iran Contra Affair, Boland Amendment, Contras, Invasion of Grenada, Comprehensive Anti-Apartheid Act, apartheid, terrorism, Gaddafi, Saddam Hussein, nuclear freeze movement, PLO, Solidarity, Intermediate Nuclear Forces Treaty, Berlin Wall falls, Lech Walesa, Boris Yeltsin, Collapse of the Soviet Union, Taliban, mujahideen, Osama bin Laden, invasion of Panama, Tiananmen Square, Persian Gulf War, Operation Desert Storm, Nelson Mandela,

DO

- Develop student research skills, including: selecting a topic of interest, formulating an inquiry question to narrow research using the Question Formulation Technique, finding, interpreting, and using online and print sources and databases that provide reputable, diverse, multiple, complex perspectives, organizing research into categories and corroborating supporting evidence, completing footnotes, completing citations/works cited bibliography, and time management.
- Develop CAPP document analysis skills(Context-historical, Audience, Purpose, Point of View.
- Develop Document-Based Question (DBQ) essay prompt dissection, thesis writing, document grouping, planning, corroboration, and writing skills.

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Bill Clinton, globalization, NAFTA & USMCA, global warming/climate change, Kyoto Protocol, NRA, Assault Weapons Ban, Family & Medical Leave Act, World Trade Bombing, Oslo Accords, Contract with America, ethnic cleansing in the former Yugoslavia, Defense of Marriage Act(DOMA), Don't Ask, Don't Tell, Welfare reform(1996), NATO, Clinton impeachment, World Wide Web/internet, dotcom boom, George W. Bush, No Child Left Behind, Medicare Prescription Drug Modernization Act, War on Terror, 9/11, Department of Homeland Security, USA Patriot Act, Bush Doctrine, axis of evil, war in Afghanistan, Iraq War, Guantanamo Bay, Hurricane Katrina, weapons of mass destruction(WMDs), Great Recession, Barack Obama, DREAM Act, Affordable Care Act/Obamacare, Occupy Wall Street movement, DACA, Tea Party, *Obergefell v. Hodges*, Black Lives Matter, Arab Spring, ISIS, Paris Climate Agreement, Iran Nuclear Deal (JCPOA), NSA, Donald Trump, Hillary Clinton, MAGA, #MeToo, movement, *Dobbs v. Jackson Women's Health*, Russian invasion of Ukraine, ICE & border crisis, Women's March, COVID-19 pandemic, Capitol Riot, Israel-Hamas War, *Obergefell v. Hodges*, March for Our Lives, Trump impeachments, Joe Biden

- Develop counterclaim/refuting argument historical thinking and writing skills.
- Develop historical analysis skills, including: inquiry, comparison, continuity & change over time, causation, corroboration, revising a claim, and synthesis.
- Develop APUSH short answer quiz strategies.
- Develop APUSH multiple choice quiz strategies.
- Develop student skills: time management and how to study effectively.
- Develop visual analysis of primary source image and political cartoon analysis skills.
- Develop APUSH writing self-reflection and goal setting skills.
- Develop speaking and listening skills.

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Common Student Misconceptions for this Unit

Students might mistakenly believe:

- AI is new.
- The internet, smartphones, social media, etc. have been in ubiquitous existence for a very long time (50 plus years).
- Iraq and Saddam Hussein were involved in 9/11.
- Osama bin Laden is from Afghanistan.
- The U.S. and other countries have always been as politically polarized as it/they are now.

Unit Assessment

Performance Assessment

Task Overview: (directions for teachers, including what the task is, how it's authentic, how it might be differentiated, materials, etc.)

The three types of performance assessments included below are intended to replicate three of the four assessments students will complete on the College Board AP US History Exam in May. Students will be given the exact amount of time they will be given on the May exam (1 minute per multiple choice question, 13 minutes for the short answer quiz, and 60 minutes for the DBQ essay). Students had been incrementally acclimated to the College Board time standards over the course of the first five of nine APUSH units.

Differentiation occurs in class on a daily basis through flexible groupings and individualized or small group instruction embedded within the class learning

Other (Formative, quizzes, tests, etc.)

- CAPP, document grouping, planning, and organizing for a practice DBQ essay prompt.
- Students will complete in class practice multiple choice, short answer, and DBQ essay responses in class assessments and ones provided in College Board's AP Classroom and the *of a Nation* textbook.
- Class activities and homework that focus on essay prompt dissection, thesis writing, essay planning, primary and secondary source reading & analysis, short answer response practice, and multiple choice practice.
- Formative assessments involving prompt dissection, thesis development, essay planning & category development,

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activities. Also, student choice of topics for the APUSH research paper provides an additional layer of differentiation. Finally, student generated questions, choice of topics/supporting content, and opportunity to connect their responses to their choice research paper topic, thesis, and acquired learning to the final exam Socratic Seminar discussion centered around the course essential question *What does it mean to be an American?* provides additional layers of differentiation.

Student Directions: (link to Google document that will be given to students)

[Period 9 \(1980-present\) Multiple Choice Quiz](#)

[Period 9 \(1945-present\) Short Answer Quiz A](#)

[Period 9 \(1980-present\) Short Answer Quiz B](#)

[Period 9 \(1980-present\) Short Answer Quiz C](#)

[Period 9 \(1980-present\) DBQ Essay Prompt A](#)

[Period 9 \(1980-present\) DBQ Essay Documents A](#)

[Period 9 \(1980-present\) DBQ Essay Prompt B](#)

[Period 9 \(1980-present\) DBQ Essay Documents B](#)

[Period 9 \(1980-present\) DBQ Essay Prompt C](#)

[Period 9 \(1980-present\) DBQ Essay Documents C](#)

[DBQ Essay Response Rubric](#)

[APUSH Choice Research Paper](#)

[APUSH Choice Research Paper TACOS SS Department Rubric](#)

[Final Exam Socratic Seminar-What does it mean to be an American?](#)

[FLOAT Speaking & Listening Rubric](#)

document groupings, and corroborative support are completed in class within flexible groups and presented to classmates for critical friend and teacher feedback.

- Class activities and homework that focus on complex historical analysis, primary and secondary source document analysis, causation, continuity & change, comparison, synthesis, visual analysis, thematic connections, corroboration, and counterclaims. Graphic organizers to support, include:

[APPARTS Document Analysis](#)

[CAPP Document Analysis](#)

[Causation](#)

[Comparison \(Two Developments\)](#)

[Comparison \(Three Developments\)](#)

[Continuity & Change Over Time](#)

[Secondary Source Text Comparisons](#)

[Synthesis](#)

[Visual Analysis Protocol](#)

[Eight Themes of APUSH](#)

- [Student Self-Reflection Writing Graphic Organizer](#)
- [APUSH Research Paper Outline](#) including thesis, categories, paragraph organization, corroborating facts, analysis, and conclusion.
- In the two to three weeks of classes leading up to the College Board AP U.S. History exam, students will complete, review, and reflect on their performance for in-class practice assessments, including: three full-length multiple

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choice, two full-length short answer, two full-length long essay, and two full-length DBQ essay assessments.

Practice Multiple Choice #1

Practice Multiple Choice #2

Practice Multiple Choice #3

Practice Short Answer #1

Practice Short Answer #2

Practice Long Essay #1

Practice Long Essay #2

Practice DBQ Essay #1

Practice DBQ Essay #2

- Class activities and assessments focus on numerous Portrait of the Graduate characteristics and attributes and students will reflect on their own specific POG characteristic and attribute performance and set future learning progression goals for themselves for the APUSH Choice Research Paper.

Supplemental Materials and Resources

- *Home of the Brave: When Southbury Said No to the Nazis*, a A Sniffen Productions documentary (2012)
- Season 1, episode 8 of "The History Channel's Ultimate Guide to the Presidents"

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Texts			
Required Texts			
Title	Author	Rationale	Lexile Level (where applicable)
<i>Fabric of a Nation, 2024</i> (Module 9)	Jason Stacy & Matthew Ellington	To provide an additional perspective about the 1980 to the present time period so students can analyze multiple perspectives. Also, to provide students with practice analyzing both primary and secondary sources. Primary source documents include: Ronald Reagan, Inaugural Address, January 20, 1981, Susan Baker & Tipper Gore (members of Parents Music Resource Center) Senate testimony, September 19, 1985, Ronald Reagan, <i>Tear Down This Wall</i> speech, 1987, Francis Fukuyama, <i>The End of History?</i> , 1989, Bill Clinton, <i>Address to Congress on Health Care Reform</i> , 1993, Bo Yee, <i>Sweatshop Warriors</i> , 2001, George W. Bush, news conference on Iraq, 2003, Frederick Harris, <i>The Price of the Ticket: Barack Obama and the Rise and Decline of Black Politics</i> , 2012, Edward Snowden, Interview in <i>The Guardian</i> , July 18, 2014	

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"Evil Empire" speech-1983 and "Perestroika-the New Thinking for Our Country and World"-1987	Ronald Reagan & Michail Gorbachev	To provide students with U.S. and Soviet leaders' perspectives during the Cold War era and to support primary source analysis skills.	
<i>Foreign Affairs</i> , "The Age of Nonpolarity"-2008	Richard Haass	To provide students with a broader understanding of post-Cold War world power centers and to support primary source analysis skills.	
<i>Lies My Teacher Told Me</i> , Chapter Down the Memory Hole	James Loewen	To provide an additional perspective about the 1980 to the present time period and why it is often so difficult to teach/learn about it.	
<i>Business Insider</i> , "Here's the last time a Supreme Court nominee was accused of sexual misconduct and how it compares to now," September 27, 2018	Grace Panetta	To provide students with an additional perspective of Period 9 scandals for more complex interpretive analysis.	

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Suggested Texts

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Learning Plan

Required Learning Activities

<i>In order to learn:</i>	<i>Students will:</i>
<p>Historical analysis, causation, corroboration, primary source analysis, thesis development & support, short answer quiz skill development, inquiry</p> <p>Problem Solver, Collaborator, & Communicator</p>	<ul style="list-style-type: none"> Analyze various primary and secondary sources about the Reagan Revolution and the conservatism it ushered in and in collaborative groups, respond to and support their responses to the prompts: <i>Why did the Reagan Revolution occur and what was its impact?</i> and <i>In what way(s) has America as a whole moved toward conservatism since 1980 and why?</i> Complete two short answer quizzes on Reaganomics and American political polarization, review student models, and reflect on their short answer skills.
<p>Historical analysis, causation, corroboration, primary source analysis, thesis development & support, short answer quiz skill development, inquiry</p> <p>Problem Solver, Collaborator, & Communicator</p>	<ul style="list-style-type: none"> Analyze various primary and secondary sources about the end of the Cold War and in collaborative groups, respond to and support their responses to the prompts: <i>Why did the Cold War end?</i> and <i>Who deserves credit for ending the Cold War?</i>

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<p>Historical analysis, causation, corroboration, thesis development & support, inquiry</p> <p>Problem Solver, Collaborator, & Communicator</p>	<ul style="list-style-type: none"> In collaborative groups determine and support a response to the prompt: How have globalization, protectionism, outsourcing, mechanization/automation, and AI impacted the U.S. economy?
<p>Historical analysis, causation, continuity & change, corroboration, thesis development & support, inquiry</p> <p>Problem Solver, Collaborator, Empathizer, & Communicator</p>	<ul style="list-style-type: none"> After analyzing various primary and secondary sources foreign and domestic challenges from 1980 to the present and in collaborative groups, respond to and support their responses to the prompts: <i>What should America's role be on the world stage?, Were U.S. military interventions after 9/11 more of a continuity or change from U.S. military interventions from 1917-2001?</i> and <i>Analyze the extent foreign and domestic challenges have impacted and shaped America.</i>
<p>Historical analysis, causation, corroboration, thesis development & support, inquiry</p> <p>Problem Solver, Collaborator, & Communicator</p>	<ul style="list-style-type: none"> After reviewing primary and secondary sources about various government scandals (Iran Contra Affair, Clinton impeachment, Trump impeachments, Clarence Thomas and Brett Kavanaugh confirmation hearings) and in collaborative groups, respond to and support their responses to the prompt: <i>What impact have government scandals had on America?</i>
<p>Historical analysis, causation, comparison, continuity & change, corroboration, document analysis, multiple choice, short answer, long essay, and DBQ essay skill development & reflection</p> <p>Planner & Communicator</p>	<ul style="list-style-type: none"> In the two to three weeks of classes leading up to the College Board AP U.S. History exam, students complete, review, and reflect on their performance for in-class practice assessments, including: three full-length multiple choice, two full-length short answer, two full-length long essay, and two full-length DBQ essay assessments.

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<p>Historical analysis, reading, & writing skills, inquiry</p> <p>Planner & Communicator (depending on student topic choice, Empathizer & Problem Solver)</p>	<ul style="list-style-type: none"> Create a question to research and write an informational or argumentative (student choice) culminating APUSH essay utilizing their historical thinking, reading, and writing skills on a topic of their choice in U.S. history.
Suggested Learning Activities	
<i>In Order to Learn:</i>	<i>Students will:</i>
	Suggested learning activities included in College Board's <u>AP United States History Course Description</u>
<p>Time management & study skills</p> <p>Planner & Communicator</p>	<ul style="list-style-type: none"> Self-reflect on time management and study skills.
<p>Time management & study skills</p> <p>Planner, Problem Solver, & Communicator</p>	<ul style="list-style-type: none"> Create a plan to study for the College Board AP US History exam using monthly and weekly planning calendars. Self-reflect on past assessment performance to prioritize the skills and content they need to most study and the most effective ways to study.
<p>Historical analysis, causation, continuity & change, corroboration, thesis development & support, inquiry</p> <p>Problem Solver, Collaborator, Empathizer, & Communicator</p>	<ul style="list-style-type: none"> Watch <i>Home of the Brave</i>, a documentary about how the citizens of Southbury, Connecticut stood up to the American Nazi party, the German American Bund, in 1937 and prevented them from establishing a Nazi camp within the Southbury town limits. Watch the documentary and analyze a series of related primary source documents, in collaborative groups apply the actions and success of Southbury citizens in 1937 and answer/support the prompt: <i>How can we stand up to hate today?</i>
<p>Historical analysis, causation,</p>	<ul style="list-style-type: none"> View season 1, episode 8 of "The History Channel's Ultimate Guide to the Presidents" (44 minutes)

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continuity & change, corroboration, thesis development & support, inquiry Communicator	and answer the prompt: <i>How do the Period 9 presidents compare in terms of intervention in foreign affairs, portrayal in the media, legacy, and their impact on the role of the presidency?</i>
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Revision History

Revision Date	Explanation of change(s) made to document

UConn ECE Unit 1 Organizer

Grade/Subject	11th & 12th Grade/UConn ECE Chinese
Unit Title	Doing Housework (做家务)
Overview of Unit	The goal of this unit is to enhance students' proficiency in the Chinese language by focusing on advanced vocabulary, grammar, and cultural understanding related to household chores, achieved through engaging activities that develop language skills and deepen cultural insights.
Pacing	About 6–7 weeks
ACTFL Proficiency Target	Intermediate Mid

Background Information For The Teacher (Unit Overview)

Rationale:

The unit on "house chores" is a valuable addition to the curriculum of UConn's early college experience class for Chinese language and culture. This unit will be taught to provide students with essential concepts and skills related to everyday tasks and responsibilities within a household. By learning about house chores, students will not only expand their vocabulary and understanding of the Chinese language but also develop practical skills that can be applied to their daily lives. The unit aligns with the ACTFL interpretive communication, interpersonal communication, and presentational communication intermediate mid standards, as it enables students to comprehend and interpret texts or conversations about house chores, engage in meaningful interactions with others regarding these tasks, and present information about house chores in a coherent and culturally appropriate manner.

UConn ECE UNIT 1 ORGANIZER

Key Learning/Big Ideas:

Essential Language Functions:

- Discuss household chores and rules
- Give and accept instructions
- Talk about when something happened
- State what must be done
- Discuss yard work and outdoor chores
- Talk about recycling
- Ask for and give help

Related Structures/Patterns:

- 从。。。起; 从。。。开始
- 非。。。不可
- 连。。。都 / 也
- 再也没有比 + Noun 1 + 更+Adjective +的 + Noun 2 + 了
- 当。。。时
- Verb + 掉
- 有的。。。有的。。。
- Verb + 开
- 不是。。。吗?
- The conditional adjective 才

Priority Vocabulary:

- Electrical Appliances
- Common household chores

UConn ECE Unit 1 Organizer

- Common outdoor chores
- Adjectives
- Recyclables and trash
- Plants and trees

Big Ideas:

- Practical Language Use: Emphasize the practical application of language in everyday contexts such as managing a household, interacting with host families, and participating in daily chores. This real-life application will help students see the relevance of their language learning.
- Cultural Immersion: Understand the cultural nuances behind household management in China, including the importance of family roles, respect for elders, and communal living practices, provides a deeper appreciation of Chinese culture.
- Environmental Awareness: Highlight the growing emphasis on recycling and energy conservation in China, which can lead to discussions on global environmental issues and compare practices between different countries.

Essential Questions

Essential Questions

- How does language shape our sense of identity?
- How does the Chinese family structure influence the language?
- How can understanding Chinese idioms (成语) deepen your grasp of the language?

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Core Content Standards	
Content Specific Standards (NGSS, SS Framework, CCS,ACTFL, etc.)	<p><u>NCSSFL-ACTFL CAN-DO STATEMENTS</u></p> <p>Interpretative Communication - I can identify the main idea and key information in short, straightforward conversations. (Intermediate Mid)</p> <p>Interpersonal Communication - I can exchange information in conversations on familiar topics and some researched topics, creating sentences and series of sentences and asking a variety of follow-up questions. (Intermediate Mid)</p> <p>Presentation Communication - I can give straightforward presentations on a variety of familiar topics and some concrete topics I have researched, using sentences and a series of connected sentences. (intermediate Mid)</p>
<p><u>CT Core Literacy Standards (non-ELA)</u> Click link, then see section on right margin titled, Grades 6-12 Literacy in History/Social Studies, Science, & Technical Subjects</p>	<p><u>Reading: Literature</u></p> <p><u>Reading: Information text</u></p> <p><u>Writing</u></p> <p><u>Speaking and Listening</u></p>
Portrait of the Graduate Characteristics	<ul style="list-style-type: none"> ● Collaborator ● Communicator ● Empathizer ● Problem Solver ● Planner

UConn ECE Unit 1 Organizer

K-U-D

UNDERSTANDS

Students will understand:

- The Chinese language connects us to its cultural values, history, and social relationships through its characters, tones, and expressions, reinforcing a collective sense of belonging and respect for tradition.
- The kinship terms and hierarchical expressions in the Chinese family structure emphasize respect, age, and defined familial roles
- Chinese idioms reveal cultural nuances, historical context, and the complex relationships between language and thought.

KNOW

- Words and expressions relating to house chores
- The Pattern 从...起
- The Adverb 或者
- The Expression 非...不可
- The Expression 再也没有比...更...的了
- The Pattern 连...都...
- The Interjection 喔
- The complement 掉
- The Pattern 同+ Number Measure Word
- The Adverb 分开
- The Expression 不是...吗?
- The Conditional Adverb 才

DO

- Talk about household chores.
- Tell someone you are unable to do something.
- Respond to someone's kindness.
- Talk about house rules.
- Give and take instructions.
- Talk about recycling.
- Talk about yard work and outdoor chores.
- Ask for and give help.
- Describe a plant or tree.
- Use sentence patterns 从...起, 非...不可, 再也没有比...更...的了, 连...都, 不是...吗 when speaking and writing about house chores.
- Use 掉, 分开, 同, 或者, 才 properly when speaking and writing about house chores.

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- Use 非, 不 properly when speaking and writing about house chores.
- Use the Interjection 喔 properly when speaking and writing about house chores.

"CAN DO" Statements

Intermediate Mid

INTERPRETIVE COMMUNICATION

- I can understand the main idea and key information in short straightforward informational texts.
- I can understand the main idea and key information in short straightforward fictional texts.
- I can identify the main idea and key information in short straightforward conversations.

INTERPERSONAL COMMUNICATION

- I can exchange information in conversations on familiar topics and some researched topics, creating sentences and series of sentences and asking a variety of follow-up questions.
- I can interact with others to meet my needs in a variety of familiar situations, creating sentences and series of sentences and asking a variety of follow-up questions.
- I can exchange preferences, feelings, or opinions and provide basic advice on a variety of familiar topics, creating sentences and series of sentences and asking a variety of follow-up questions.

PRESENTATIONAL COMMUNICATION

- I can tell a story about my life, activities, events, and other social experiences, using sentences and a series of connected sentences.
- I can state my viewpoint about familiar topics and give some reasons to support it, using sentences and a series of connected sentences.
- I can give straightforward presentations on a variety of familiar topics and some concrete topics I have researched, using sentences and a series of connected sentences.

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Common Student Misconceptions for this Unit

Students might mistakenly believe:

- Because 非, and 不 both mean “not”, they are interchangeable in every context.
- Most families in China have houses.
- Most families in China have heating during winter.
- Most students in China do house chores.
- Every high school student in China can go to college if they want to.

Unit Assessment

Performance Assessment

IPA (Integrated Performance Assessment) - Doing Housework

Task Overview:

Interpretative task:

You are an exchange student living with a Chinese family in China. The parents make a list of the house chores for you and your own kids. Please read the list and complete nine tasks:

- Keyword recognition
- Main ideas
- Supporting details
- Organizational features
- Guessing meaning from text

Other (Formative, quizzes, tests, etc.)

- Unit 1 Quiz A
- Unit 1 Quiz B
- Unit 1 Test
- in-class interpretive, interpersonal, and presentational communication activities.

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- Inferences
- Author's perspective
- Comparing cultural perspectives
- Personal reaction to the text

Interpersonal Task

Everyone has different household responsibilities. Discuss with a classmate your typical household chores (you can also talk about other members of your household). React to your classmate's chores by expressing your opinion and asking follow-up questions. (Teachers may choose to supply each student with a supplemental list of vocabulary associated with household chores/responsibilities).

Presentational Task

You have a pen pal in China. Write an email to your pen pal about the types of household tasks/chores you are expected to do, providing as many details as possible (for example, indoors vs. outdoor chores, seasonal chores, etc.). Additionally, be sure to ask your friend about the kind of household tasks they are responsible for doing. Your teacher may provide you with a checklist of vocabulary and grammar that should be included in the presentation.

Student Directions:

- IPA Unit 1
- Rubrics for interpretive, interpersonal, and presentational communication.

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Can Do statements	
Interpretive Mode: I can identify most household chores and tasks on a poster. I can use the information I understand to answer questions.	
Presentational Mode: I can write an email describing household chores and responsibilities. I inquire as to the types of household tasks someone engages in.	
Interpersonal Mode: I can describe household chores. I can participate in a discussion about what types of chores are done in my house.	

Supplemental Materials and Resources

- online textbooks, online workbooks, character practice books
- Games such as Quizlet, Blooket, Gimkit, wordwall

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Texts			
Required Texts			
Title	Author	Rationale	Lexile Level (where applicable)
<i>Zhen Bang 3</i>	Margaret M. Wong	ACTFL standards aligned	
Suggested Texts			
Harvest - Intermediate Chinese	Jialu Xu	Good authentic reading materials and other resources	
Fiveable - AP Chinese	https://library.fiveable.me/ap-chinese	authentic materials align with the six themes of the UConn ECE course	

Learning Plan	
Required Learning Activities	
<i>In order to learn:</i>	<i>Students will:</i>
<i>the vocabulary of Electrical Appliances</i> <i>Common household chores</i> <i>Common outdoor chores</i> <i>Adjectives</i> <i>Recyclables and trash</i> <i>Plants and trees</i>	<ul style="list-style-type: none"> do interactive activities on Quizlet, Gimkit, Blooket, Wordwall, etc. make sentences using these characters read sentences made with these characters rearrange sentences with these characters describe the pictures provided with the characters and phrases learned

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<p><i>the sentence structures</i> 从。。。起; 从。。。开始 非。。。不可 连。。。都 / 也 再也没有比 + <i>Noun 1</i> + 更+<i>Adjective</i> + 的 + <i>Noun 2</i> + 了 当。。。时 <i>Verb</i> + 掉 有的。。。有的。。。 <i>Verb</i> + 开 不是。。。吗? <i>The conditional adjective 才</i></p>	<ul style="list-style-type: none"> • make sentences based on the pictures provided • describe the pictures provided with sentence structures learned • make conversations with the pictures provided • watch the videos of the authentic conversations using these sentence structures • listen to the videos, read out loud, understand and interpret them • rewrite these conversations with information related to students
<p><i>Essential Language Functions of</i></p> <ul style="list-style-type: none"> • <i>Discuss household chores and rules</i> • <i>Give and accept instructions</i> • <i>Talk about when something happened</i> • <i>State what must be done</i> • <i>Discuss yard work and outdoor chores</i> • <i>Talk about recycling</i> • <i>Ask for and give help</i> 	<p>Students will do activities in modes of interpretive, interpersonal, and presentational</p> <p>Interpretative communication</p> <ul style="list-style-type: none"> • Listen or read the dialogues and choose the right pictures or the right written answers • Listen or read posters, ads, newspaper articles, rules, flyers, websites, etc., and answer questions <p>Interpersonal Speaking</p> <ul style="list-style-type: none"> • Get into groups of three or four students and create an outdoor landscaping business plan or a green commerce business plan. Discuss the following questions within your group, then present your business plan to the class. <p>Presentational Writing</p> <ul style="list-style-type: none"> • You are in the market for a housekeeper. Write a job posting in Chinese to hire your own housekeeper. Explain why you need a housekeeper to clean the house, and what they will need to do, and include your contact information • Write a post in Chinese on a separate piece of paper about some housework you did recently. After you have written it, get into groups of three or four and pass your sheet around, having your group members comment on your posting.

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<i>how to become collaborators</i>	<ul style="list-style-type: none"> • Work on group projects such as creating presentations, skits, or reports related to the Chinese language and culture. • Work on group writing tasks, such as co-authoring essays or stories, to improve writing skills and teamwork. • Review and edit each other's work, promoting teamwork and improving language proficiency.
<i>how to become empathizers</i>	<ul style="list-style-type: none"> • Compare Chinese culture with their own cultures. Discuss the similarities and differences in values, emotions, and social norms to foster empathy • discuss on challenging topics or empathy-related activities like writing letters from the perspective of a Chinese character. • share personal experiences related to Chinese culture and language to connect on a personal level.
<i>how to become communicators</i>	<ul style="list-style-type: none"> • speak as much Chinese as possible during class. • have discussions and debates in pairs or small groups. • write journals about daily experiences, thoughts, and reflections in Chinese.
Suggested Learning Activities	
<i>In order to learn:</i>	<i>Students will:</i>
<i>to improve their interpretive, interpersonal, and presentational skills</i>	<ul style="list-style-type: none"> • Use these <u>resources</u> to support their learning.

Revision History

Revision Date

Explanation of change(s) made to document

UConn ECE UNIT 1 ORGANIZER

UCONN ECE UNIT 2 ORGANIZER

Grade/Subject	11th & 12th Grade/UCONN ECE Chinese
Unit Title	我的理想 My Dreams
Overview of Unit	The goal of this unit is to improve students' Chinese language proficiency through advanced vocabulary, grammar, and cultural insights centered around "future plans and career", using engaging activities to enhance language skills and cultural understanding.
Pacing	6-7 weeks
ACTFL Proficiency Target	Intermediate Mid

Background Information For The Teacher (Unit Overview)

Rationale:

The inclusion of the "Future Plan and Career" unit in the UCONN Early College Experience class for Chinese language and culture is of paramount importance. This unit provides students with essential concepts and skills that are indispensable for their personal and professional development. By exploring future plans and careers, students gain insight into their own aspirations and interests, enabling them to make informed decisions about their educational and vocational paths. Additionally, learning about future plans and careers enhances students' understanding of Chinese society and culture, as these topics are intricately linked to the Chinese experience.

Key Learning/Big Ideas:

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Essential Language Functions:

- Discuss careers and jobs
- Talk about interests
- Discuss changing plans
- Explain reasoning
- Talk about future plans
- Create an analogy
- Use communication technology
- Wish someone well
- Apply for a college or a job
- Discuss work experiences
- Write a cover letter
- Write a resume

Related Structures/Patterns:

- 跟。。。有关
- 好像。。。似的
- 不是不。。。, 不过
- 是。。。, 而不是
- 本来。。。, 后来
- 半。。。半
- 得。。。才行
- 只要。。。就
- 被

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- The compliment Verb + 着

Priority Vocabulary:

- Careers and jobs
- Schools
- College application
- Blessings and well wishes
- Resume

Big Ideas

- Aspiration and Ambition: Emphasize the importance of setting goals, pursuing dreams, and the role of education and career choices in personal fulfillment.
- Cultural Perspectives on Work and Study: Understand the cultural differences and similarities in attitudes toward education and career between China and the United States can foster greater global awareness and empathy.
- Navigating Change: Explore how globalization and technological advancements are reshaping job markets and educational paths, particularly in China, and what this means for students preparing for the future.

Essential Questions

Essential Questions

- What will make you most happy?
- How does the Chinese educational system influence language learning and values?
- What strategies can help improve fluency in Chinese speaking and listening?

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Core Content Standards	
<p>Content Specific Standards (NGSS, SS Framework, CCS, ACTFL, etc.)</p>	<p><u>NCSSFL-ACTFL CAN-DO STATEMENTS</u></p> <p>Interpretative Communication - I can identify the main idea and key information in short, straightforward conversations. (Intermediate Mid)</p> <p>Interpersonal Communication - I can exchange information in conversations on familiar topics and some researched topics, creating sentences and series of sentences and asking a variety of follow-up questions. (Intermediate Mid)</p> <p>Presentation Communication - I can give straightforward presentations on a variety of familiar topics and some concrete topics I have researched, using sentences and a series of connected sentences. (intermediate Mid)</p>
<p><u>CT Core Literacy Standards (non-ELA)</u> Click link, then see section on right margin titled, Grades 6-12 Literacy in History/Social Studies, Science, & Technical Subjects</p>	<p><u>Reading: Literature</u></p> <p><u>Reading: Information text</u></p> <p><u>Writing</u></p> <p><u>Speaking and Listening</u></p>

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Portrait of the Graduate Characteristics

- Collaborator
- Communicator
- Empathizer
- Problem Solver
- Planner

K-U-D

UNDERSTANDS

Students will understand that:

- Personal happiness relates to individual aspirations and career choices.
- Chinese education puts a lot of emphasis on memorizing things, standardized tests, and showing respect for teachers and tradition
- Practicing with native speakers and regularly tuning into Chinese media can help boost your speaking and listening skills.

KNOW

- Words and expressions relate to future plans and careers
- The Pattern 跟...有关
- The Pattern 好像...似的
- The Expression 不是不...不过...

DO

- Express your life goals.
- Talk about careers.
- Clarify what is and is not important.
- Talk about helping others.

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- The Pattern 是...,而不是...
- The Pattern 本来...后来...
- The Expression 半...半...
- The Pattern 得...才行
- The Pattern 只要...就...
- The Complement 着
- The Passive Coverb 被

- Discuss changing plans.
- Ask about post-graduation plans.
- Explore future plans.
- Apply for college.
- Apply for a job.
- Talk about work experiences.
- Talk about your education.
- Give someone a blessing.
- Use sentence patterns 跟...有关, 好像...似的, 是...,而不是..., 本来...后来..., 得...才行, 只要...就...when speaking and writing about future plans and career-related topics.
- Use 不是不...不过, 半...半..., 着 and the passive coverb 被 properly when speaking and writing about future plans and career-related topics.

"CAN DO" Statements

Intermediate Mid

INTERPRETIVE COMMUNICATION

- I can understand the main idea and key information in short straightforward informational texts.
- I can understand the main idea and key information in short straightforward fictional texts.

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- I can identify the main idea and key information in short straightforward conversations.

INTERPERSONAL COMMUNICATION

- I can exchange information in conversations on familiar topics and some researched topics, creating sentences and series of sentences and asking a variety of follow-up questions.
- I can interact with others to meet my needs in a variety of familiar situations, creating sentences and series of sentences and asking a variety of follow-up questions.
- I can exchange preferences, feelings, or opinions and provide basic advice on a variety of familiar topics, creating sentences and series of sentences and asking a variety of follow-up questions.

PRESENTATIONAL COMMUNICATION

- I can tell a story about my life, activities, events, and other social experiences, using sentences and series of connected sentences.
- I can state my viewpoint about familiar topics and give some reasons to support it, using sentences and series of connected sentences.
- I can give straightforward presentations on a variety of familiar topics and some concrete topics I have researched, using sentences and series of connected sentences.

Common Student Misconceptions for this Unit

Students might mistakenly believe:

- Volunteering is very popular in China and is one of the requirements of high school graduation.
- Every high school graduate can go to college if they want to.
- China, there are as many private universities as those in America; A Private university education is as good as that of a public university.
- Tuition of the private universities is much higher than that of the public universities.
- The driver's license in China is an official document and is widely accepted.

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Unit Assessment	
Performance Assessment	Other
<p>*(Performance Task = "An Inquiry")</p> <p><i>Feel free to merge cells and include how your performance assessment embeds all three modes.</i></p> <p>Task Overview</p> <p>Interpretative task:</p> <p>You are attending Peking University in China. It is the beginning of the school year. You need to read and understand the university's course description. After you finish reading the course description, please complete the following activities</p> <ul style="list-style-type: none">• Keyword recognition• Main ideas• Supporting details• Organizational features• Guessing meaning from text• Inferences• Author's perspective	<ul style="list-style-type: none">• <u>Unit 2 Quiz A</u>• <u>Unit 2 Quiz B</u>• <u>Unit 2 Test</u>• in-class interpretive, interpersonal, and presentational communication activities.

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- Comparing cultural perspectives
- Personal reaction to the text

Interpersonal Task

Ah! Your dream job! What kind of job/career would you like to pursue after high school?

Interview your classmate about what kind of company or career they would be interested in pursuing. What talents, skills, personality traits, and/or educational preparation are needed to be successful for the job? Each student will participate twice, once as the interviewer and once as the interviewee.

Presentational Task

High school graduates face so many options: work directly out of high school; attend college or vocational school; take a gap year and delay school. Which option appeals to you? Prepare and write a persuasive essay defending your future path beyond high school.

Student Directions:

- IPA Unit 2
- Rubrics for interpretive, interpersonal, and presentational communication.

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Can Do Statements

Interpretive:

- I can read and understand a course description.
- I can use the information I understand to answer questions.

Interpersonal:

- I can interview my classmates about what kind of company they want to work for or what kind of career they are interested in pursuing.
- I can be interviewed by my classmates on the same topics while sharing my personal opinion.

Presentational:

I can compose a persuasive essay defending my views on my future beyond high school.

Supplemental Materials and Resources

- online textbooks, online workbooks, character practice books
- Games such as Quizlet, Blookey, Gimkit, wordwall

UConn ECE Unit 2 Organizer

Texts			
Required Texts			
Title	Author	Rationale	Lexile Level (where applicable)
<i>Zhen Bang 3</i>	Margaret M. Wong	ACTFL standards aligned	
Suggested Texts			
Harvest - Intermediate Chinese	Jialu Xu	Good authentic reading materials and other resources	
Fiveable - AP Chinese	https://library.fiveable.me/ap-chinese	authentic materials align with the six themes of the UConn ECE course	

Learning Plan	
Required Learning Activities	
<i>In Order to Learn:</i>	<i>Students will:</i>

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<p><i>the vocabulary of Careers and jobs</i> <i>Schools</i> <i>College application</i> <i>Blessings</i> <i>well wishes & Resume</i></p>	<ul style="list-style-type: none"> • do interactive activities on Quizlet, Gimkit, Blooket, Wordwall, etc. • make sentences using these characters • read sentences made with these characters • rearrange sentences with these characters • describe the pictures provided with the characters and phrases learned • listen and match what you heard with the pictures provided • describe the pictures with the vocab learned
<p>the sentence structures:</p> <ul style="list-style-type: none"> • 跟。。。有关 • 好像。。。似的 • 不是不。。。, 不过 • 是。。。, 而不是 • 本来。。。, 后来 • 半。。。半 • 得。。。才行 • 只要。。。就 • 被 • The compliment Verb + 着 	<ul style="list-style-type: none"> • make sentences based on the pictures provided • describe the pictures provided with sentence structures learned • make conversations with the pictures provided • watch the videos of the authentic conversations using these sentence structures • listen to the videos, read out loud, understand and interpret them • rewrite these conversations with information related to students
<p><i>Essential Language Functions of</i></p> <ul style="list-style-type: none"> • Discuss careers and jobs • Talk about interests • Discuss changing plans • Explain reasoning 	<p>Complete activities in modes of interpretive, interpersonal, and presentational</p> <p>Interpretative Communication</p> <ul style="list-style-type: none"> • listen or read the dialogues and choose the right pictures or choose the right answers • listen or read posters, ads, newspaper articles, rules, flyers, websites, etc., and answer questions <p>Interpersonal Speaking</p>

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<ul style="list-style-type: none"> • Talk about future plans • Create an analogy • Use communication technology • Wish someone well • Apply for a college or a job • Discuss work experiences • Write a cover letter • Write a resume 	<ul style="list-style-type: none"> • Imagine you own a company and need to recruit a new employee. Work in groups of four and rotate so each person acts as the interview candidate. Draft a short job description and do a mock interview. • survey four different students about their future plans. Draw a table with each student's education level, major, career, and personality for this career. • gather four students in a group. First, choose one Chinese and one American university. Then search the internet or other resources (alumni info, recruiting posters, school bulletins, etc.) to find out the admission qualifications of those schools. Make a comparison table as follows and report to the class the similarities and differences between them. <p>Presentation communication</p> <ul style="list-style-type: none"> • Prepare a two-minute presentation in Chinese to describe how to treat a pet correctly according to the veterinarian's instructions. You have four minutes to prepare your presentation based on the information provided. • First, think of a job that you would like to apply for. Then write a 200-300 character cover letter detailing your work experience. Be sure to include what we have learned.
<p><i>to become collaborators</i></p>	<ul style="list-style-type: none"> • work on group projects such as creating presentations, skits, or reports related to the Chinese language and culture. • work on group writing tasks, such as co-authoring essays or stories, to improve writing skills and teamwork. • review and edit each other's work, promoting teamwork and improving language proficiency.
<p><i>to become communicators</i></p>	<ul style="list-style-type: none"> • speak as much Chinese as possible during class. • have discussions and debates in pairs or small groups. • write journals about daily experiences, thoughts, and reflections in Chinese.
<p><i>to become problem solvers</i></p>	

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	<ul style="list-style-type: none"> • have discussions on complex cultural issues or debates on contemporary topics. • analyze the scenario of real-life case studies related to the Chinese language and culture, identify the problem, and propose solutions in Chinese. • play language-related games or culturally-themed puzzles.
<i>r to become planners</i>	<ul style="list-style-type: none"> • know the syllabus and class schedule, including assignment due dates, test dates, and major projects very well, so they can plan their study time effectively. • set both short-term and long-term language learning goals and break down these goals into achievable steps. • prioritize tasks based on urgency and importance, and focus on high-priority items first.
Suggested Learning Activities	
<i>In Order to Learn:</i>	<i>Students will:</i>
<i>In order to improve their interpretive, interpersonal, and presentational skills</i>	<ul style="list-style-type: none"> • Use these <u>resources</u> to improve presentation skills

Revision History	
Revision Date	Explanation of change(s) made to document

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UConn ECE Unit 3 Organizer

Grade/Subject	11th & 12th Grade/UConn ECE Chinese
Unit Title	旅行去 Traveling
Overview of Unit	The goal of this unit is to improve students' proficiency in the Chinese language through advanced vocabulary, grammar, and cultural understanding centered around travel and sightseeing, using engaging activities to develop language skills and deepen their cultural insights in this context.
Pacing	6 - 7 weeks
ACTFL Proficiency Target	Intermediate Mid

Background Information For The Teacher (Unit Overview)

Rationale:

The unit on "travel and site-seeing" is a valuable addition to the UConn Early College Experience class for Chinese language and culture. It is essential for students to learn these concepts and skills as it not only broadens their understanding of the Chinese language and culture but also equips them with practical abilities that can be utilized throughout their lives. By studying this unit, students can develop proficiency in ACTFL interpretive communication, interpersonal communication, and presentational communication at the intermediate mid standards.

Key Learning/Big Ideas:

Essential Language Functions:

- Describe your environment
- Talk about camping
- Discuss zoo animals
- Formulate impressions

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- Ask about school trips
- Develop opinions
- Make reservations
- Select travel destinations
- Organize trip plans
- List events chronologically

Related Structures/Patterns:

- Adjective + 得没话说
- Subject + 不至于 + Verb Phrase
- 。。。倒是。。,不过
- 。。。是为了。。
- 像。。一样
- 要不是
- 反正
- Subject + 等 + Verb Phrase 1 + 再 + Verb Phrase 2
- 除非。。否则
- Subject + Verb + 得 + 差不多 + 了
- 没多少 + Noun
- 尤其是
- 在。。以内 / 外
- 并不 / 没

Priority Vocabulary:

- Camping
- Wild animals
- Middle Eastern countries
- Continents
- Oceans

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- Scenic spots
- U.S. cities
- U.S. tourist attractions
- Travel
- Airplane
- Hotel reservations

Big Ideas

- Global Awareness: Emphasize the importance of understanding diverse geographical regions, cultural landmarks, and travel experiences to foster global awareness and appreciation.
- Practical Communication: Enhance the ability to navigate and communicate effectively in different environments with practical language skills in real-life travel scenarios.
- Cultural Exchange: Highlight the value of cultural exchange and tourism in promoting understanding and connections between people from different backgrounds.

Essential Questions

Essential Questions

- How are we transformed by our study of other languages and cultures?
- How do cultural differences and language barriers affect the travel experience in China?
- What strategies can travelers use to overcome those cultural differences and language barriers?

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Core Content Standards

<p>Content Specific Standards (NGSS, SS Framework, CCS, ACTFL, etc.)</p>	<p><u>NCSSFL-ACTFL CAN-DO STATEMENTS</u></p> <p>Interpretative Communication - I can identify the main idea and key information in short, straightforward conversations. (Intermediate Mid)</p> <p>Interpersonal Communication - I can exchange information in conversations on familiar topics and some researched topics, creating sentences and series of sentences and asking a variety of follow-up questions. (Intermediate Mid)</p> <p>Presentation Communication - I can give straightforward presentations on a variety of familiar topics and some concrete topics I have researched, using sentences and a series of connected sentences. (Intermediate Mid)</p>
<p>Portrait of the Graduate Characteristics</p>	<ul style="list-style-type: none"> ● Collaborator ● Communicator ● Empathizer ● Problem Solver ● Planner

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K-U-D

UNDERSTANDS

Students will understand:

- Learning new languages broadens our view, builds empathy, and improves communication. It deepens our understanding of global issues and fosters appreciation for diversity.
- Cultural differences and language barriers in China affect communication, understanding customs, getting around, and ordering food. Overcoming these challenges takes patience, openness, and a willingness to adapt to Chinese culture.
- Travelers to China should learn basic Mandarin, research local customs, and be respectful and patient in interactions.

KNOW

- “有事” is a phrase people often use to say “no”
- 的, 得, 地 have the same pronunciation but different meanings.
- Chinese people are often reserved and tend to feel reluctant to directly accept or reject others. They prefer to express their thoughts by taking an indirect approach.
- In the Chinese language, it is important to be cautious when using metaphors. Generally, you can't compare people with animals.
- There are Chinatowns in many big cities in America.
- The small commodity market is a market model with Chinese characteristics. It consists of many stalls. The styles are complete, and the prices are low.

Students will also know

- Words and expressions relating to travel and site-seeing
- The Pattern: Adjective 得没话说
- The Adverb 不至于

DO

- Talk about camping.
- Describe your environment.
- Ask about school trips.
- Talk about a visit to a museum.
- Give your impression of a situation.
- End a conversation appropriately.
- Talk about waiting for the right time.
- Talk about making reservations.
- Talk about trip plans.
- List events chronologically.
- Talk about wild animals.
- Talk about American destinations.
- Talk about Middle Eastern countries.
- Use sentence patterns 得。。没话说, 。。倒是。。, 不过。。, 。。是为了。。, 像。。一样, 要不是, 等。。再。。, 除非。。否

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- The Pattern ...倒是...,不过...
- The Pattern ...是为了...
- The Pattern 像...一样
- The Pattern 要不是...,...
- The Adverb 反正
- The Pattern 等...再...
- The Pattern 除非...,否则...
- The Expression V 得差不多了
- The Expression 没多少
- The Expression 尤其是
- The Pattern 在...之内/ 在...之外
- The Pattern 并不/没...

- 则。。, 在。。之内/之外, 并不/没when speaking and writing about travel and site-seeing.
- Use 不至于, 反正, 没多少, 尤其是 properly when speaking and writing about travel and site-seeing.
 - Use 尤其是, 特别 properly when speaking and writing about travel and site-seeing.
 - Use 以内, 以外 properly when speaking and writing about travel and site-seeing.

“CAN DO” Statements

Intermediate Mid

INTERPRETIVE COMMUNICATION

- I can understand the main idea and key information in short straightforward informational texts.
- I can understand the main idea and key information in short straightforward fictional texts.
- I can identify the main idea and key information in short straightforward conversations.

INTERPERSONAL COMMUNICATION

- I can exchange information in conversations on familiar topics and some researched topics, creating sentences and series of sentences and asking a variety of follow-up questions.
- I can interact with others to meet my needs in a variety of familiar situations, creating sentences and series of sentences and asking a variety of follow-up questions.
- I can exchange preferences, feelings, or opinions and provide basic advice on a variety of familiar topics, creating sentences and series of

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sentences and asking a variety of follow-up questions.

PRESENTATIONAL COMMUNICATION

- I can tell a story about my life, activities, events, and other social experiences, using sentences and series of connected sentences.
- I can state my viewpoint about familiar topics and give some reasons to support it, using sentences and series of connected sentences.
- I can give straightforward presentations on a variety of familiar topics and some concrete topics I have researched, using sentences and series of connected sentences.

Common Student Misconceptions for this Unit

Students might mistakenly believe:

- that pets are common in Chinese families
- that the largest Chinatown is in New York.
- that 尤其 and 特别 are the same.
- that 以内 and 以外 are both used to describe the numbers

Unit Assessment

Performance Assessment

Task Overview: (directions for teachers, including what the task is, how it's authentic, how it might be differentiated, materials, etc.)

Interpretative task:

Other

- Unit 3 Quiz A
- Unit 3 Quiz B
- Unit 3 Test
- in-class interpretive, interpersonal, and presentational communication activities.

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You are traveling to China this summer vacation. You are getting some information by surfing the Chinese travel websites. Pick one of the websites you like the most and complete the activities below:

- Keyword recognition
- Main ideas
- Supporting details
- Organizational features
- Guessing meaning from text
- Inferences
- Author's perspective
- Comparing cultural perspectives
- Personal reaction to the text

Interpersonal Task:

Camping vs. Staying in a Hotel: Which one is better? First, create a list of the pros and cons of camping, then another list of the pros and cons of staying in a hotel. Discuss with a classmate which you prefer: camping or staying in a hotel. React to your classmate's opinions and preferences.

(Teachers may choose to supply each student with a list of vocabulary associated with camping or staying in a hotel).

Presentational Task:

You just returned from a Winter Break trip. Create a slideshow presentation describing your trip.

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You will speak for at least 2 minutes talking about where you traveled, transportation, travel time to destination, weather, accommodations as well as meals and entertainment.

Student Directions:

- Unit 3 IPA
- Rubrics for interpretive, interpersonal, and presentational communication.

Can Do Statements

Interpretative Mode:

I can understand a Chinese language travel website. I can find specific information and answer questions.

Presentational Mode:

I can create a slideshow presentation on a Winter Break trip, and then present it to my classmates.

Interpersonal Mode:

I can write down a list of the pros and cons of camping. I can write down a list of pros and cons of staying in a hotel. I can express my opinion and persuade others.

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Supplemental Materials and Resources

Texts

Required Texts

Title	Author	Rationale	Lexile Level (where applicable)
<i>Zhen Bang 3</i>	Margaret M. Wong	ACTFL standards aligned	

Suggested Texts

Harvest - Intermediate Chinese	Jialu Xu	Good authentic reading materials and other resources	
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Fiveable - AP Chinese	https://library.fiveable.me/ap-chinese	authentic materials align with the six themes of the UCONN ECE course	
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Learning Plan	
Required Learning Activities	
<i>In order to learn:</i>	<i>Students will:</i>
<p><i>the vocabulary of</i></p> <ul style="list-style-type: none"> • Camping • Wild animals • Middle Eastern countries • Continents • Oceans • Scenic spots • U.S. cities • U.S. tourist attractions • Travel • Airplane • Hotel reservations 	<ul style="list-style-type: none"> • do interactive activities on Quizlet, Gimkit, Blooket, Wordwall, etc. • make sentences using these characters • read sentences made with these characters • rearrange sentences with these characters • describe the pictures provided with the characters and phrases learned • listen and match what you heard with the pictures provided • describe the pictures with the vocab learned • Roleplay
<p><i>the sentence structures:</i></p> <ul style="list-style-type: none"> • Adjective + 得没话说 • Subject + 不至于 + Verb Phrase • 。。。倒是。。,不过 • 。。。是为了。。 • 像。。一样 	<ul style="list-style-type: none"> • make sentences based on the pictures provided • describe the pictures provided with sentence structures learned • make conversations with the pictures provided • watch the videos of the authentic conversations using these sentence structures • listen to the videos, read out loud, understand and interpret them

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<ul style="list-style-type: none"> • 要不是 • 反正 • Subject + 等 + Verb Phrase 1 + 再 + Verb Phrase 2 • 除非。。。否则 • Subject + Verb + 得 + 差不多 + 了 • 没多少 + Noun • 尤其是 • 在。。。以内 / 外 • 并不 / 没 	<ul style="list-style-type: none"> • rewrite these conversations with information related to students • role play
<p><i>learn Essential Language Functions of</i></p> <ul style="list-style-type: none"> • Describe your environment • Talk about camping • Discuss zoo animals • Formulate impressions • Ask about school trips • Develop opinions • Make reservations • Select travel destinations • Organize trip plans • List events chronologically 	<p>Do activities in modes of interpretive, interpersonal, and presentational</p> <p>Interpretative listening and reading</p> <ul style="list-style-type: none"> • listen or read the dialogues and choose the right pictures or choose the right answers • listen or read posters, ads, newspaper articles, rules, flyers, websites, etc., and answer questions <p>Interpersonal Speaking</p> <ul style="list-style-type: none"> • working in groups of three or four students, plan a camping trip. • working with groups, create an improv hotel scene. One student will play the role of the hotel front desk clerk while the others play customers. Each customer will confront the front desk clerk with a question or complaint, and the clerk must give an appropriate response. No question or complaint can be reused. If the front desk clerk doesn't know how to help the customer, the clerk role gets passed to another student. <p>Presentational communication</p> <ul style="list-style-type: none"> • write a short profile in Chinese about one of the Middle Eastern countries you have learned in this lesson. Be sure to include general information about the country, and select one of the following topics to write about in more detail. Topics include a brief history of the country, the country's flag and its meaning, food and culture, industry, and economy. • imagine you are planning a week-long trip to China to see a friend. The budget you have for this is 9,000 RMB, so make sure to keep track of the costs of everything so you can stay within budget. Once you have

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	completed the itinerary, write an email to your friend and tell him/her your full itinerary based on what you planned. Be thorough so your friend will know where to find you at any given time during your trip.
<i>become communicators</i>	<p>Speak as much Chinese as possible during class.</p> <ul style="list-style-type: none"> • have discussions and debates in pairs or small groups. • write journals about daily experiences, thoughts, and reflections in Chinese.
<i>become problem solvers</i>	<ul style="list-style-type: none"> • have discussions on complex cultural issues or debates on contemporary topics. • analyze the scenario of real-life case studies related to the Chinese language and culture, identify the problem, and propose solutions in Chinese. • play language-related games or culturally-themed puzzles.
<i>become planners</i>	<ul style="list-style-type: none"> • know the syllabus and class schedule, including assignment due dates, test dates, and major projects very well, so they can plan their study time effectively. • set both short-term and long-term language learning goals and break down these goals into achievable steps. • prioritize tasks based on urgency and importance, and focus on high-priority items first.
<i>become Empathizers</i>	<ul style="list-style-type: none"> • compare Chinese culture with their own cultures. Discuss the similarities and differences in values, emotions, and social norms to foster empathy. • discuss challenging topics or empathy-related activities like writing letters from the perspective of a Chinese character. • share personal experiences related to Chinese culture and language to connect on a personal level.
Suggested Learning Activities	
<i>In order to learn:</i>	<i>Students will:</i>
<i>improve their interpretive, interpersonal, and presentational skills</i>	<ul style="list-style-type: none"> • I use these <u>resources</u>.

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Revision History

Revision Date	Explanation of change(s) made to document

UCONN ECE UNIT 4 ORGANIZER

Grade/Subject	11th & 12th Grade/UCONN ECE Chinese
Unit Title	中西文学 Chinese and Western Literature
Overview of Unit	The goal of this unit is to improve students' proficiency in the Chinese language through advanced vocabulary, grammar, and cultural understanding centered on literature, using engaging activities to develop language skills and deepen cultural insights in this context.
Pacing	6 - 7 weeks
ACTFL Proficiency Target	Intermediate Mid

Background Information For The Teacher (Unit Overview)

Rationale:

The unit on "Chinese and Western Literature" holds significant importance for students enrolled in the UCONN Early College Experience class for Chinese language and culture. By exploring this subject, students gain a deep understanding of both Chinese and Western literary traditions, allowing them to develop critical thinking skills, cultural appreciation, and enhanced communication abilities. In accordance with the ACTFL interpretive communication standards at the intermediate-mid level, students can engage with various literary texts, analyze their content, and interpret the underlying cultural and historical contexts. This unit also promotes interpersonal communication skills as students engage in discussions and debates about literary themes and interpretations, fostering cross-cultural understanding and empathy. Additionally, through presentational communication, students can express their thoughts and ideas about literature, effectively utilizing language to convey their insights. These acquired skills are not only valuable in academic settings but also find practical application in daily life, such as in intercultural exchanges, cross-cultural negotiations, and personal expression. Understanding Chinese and Western literature equips students with a broader worldview, enabling them to appreciate diverse perspectives and become effective communicators in an increasingly globalized world.

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Key Learning/Big Ideas:

Essential Language Functions:

- Talk about cold weather
- Discuss a performance
- Support an opinion
- Express appreciation for literature
- Compare and contrast
- Describe someone's characteristics
- Re-tell a story
- Discuss literature and authors
- Talk about insects

Related Structures/Patterns:

- 一方面。。。另一方面
- Subject + 可 + Adjective/Adverb/Verb
- 对。。。来说
- 管。。。叫
- 任何。。。都
- 更别说。。。了
- 尽管。。。不过
- 不管。。。都
- 到底
- 根本
- Verb + 来 + Verb + 去

Priority Vocabulary:

- Western literature
- Famous authors
- Winter scenery
- Chinese literature and types

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- Performance
- Adjectives
- Insects
- Characteristics/temperament
- Gender

Big Ideas

- Cultural Literacy through Literature: Emphasize the role of literature in understanding and appreciating cultural heritage, values, and historical contexts of both Chinese and Western societies.
- Language and Expression: Highlight the power of language in literary expression, exploring how different languages and literary forms convey complex ideas, emotions, and stories.
- Comparative Literary Analysis: Compare and contrast Chinese and Western literary traditions, themes, and narrative styles to foster a deeper global literary appreciation.

Essential Questions

Essential Questions

- How does literature affect our culture and society?
- In what ways do the historical and philosophical foundations of China and the West shape the themes and styles found in their literature?
- What strategies can help maintain motivation when learning Chinese?

Core Content Standards

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<p>Content Specific Standards (NGSS, SS Framework, CCS, ACTFL, etc.)</p>	<p><u>NCSSFL-ACTFL CAN-DO STATEMENTS</u></p> <p>Interpretative Communication - I can identify the main idea and key information in short, straightforward conversations. (Intermediate Mid)</p> <p>Interpersonal Communication - I can exchange information in conversations on familiar topics and some researched topics, creating sentences and series of sentences and asking a variety of follow-up questions. (Intermediate Mid)</p> <p>Presentation Communication - I can give straightforward presentations on a variety of familiar topics and some concrete topics I have researched, using sentences and a series of connected sentences. (intermediate Mid)</p>
<p><u>CT Core Literacy Standards (non-ELA)</u> Click link, then see section on right margin titled, Grades 6-12 Literacy in History/Social Studies, Science, & Technical Subjects</p>	<p><u>Reading: Literature</u></p> <p><u>Reading: Information text</u></p> <p><u>Writing</u></p> <p><u>Speaking and Listening</u></p>
<p>Portrait of the Graduate Characteristics</p>	<ul style="list-style-type: none"> ● Collaborator ● Communicator ● Empathizer ● Problem Solver ● Planner

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K-U-D

UNDERSTANDS

Students will understand:

- Literature shapes our beliefs, values, and how we understand the world, often changing the way we see ourselves and others.
- Chinese literature focuses on family and community, while Western stories often focus on themes of individuality and freedom.
- Incorporating fun stuff like games and music, along with connecting with other learners, can make learning Chinese way more enjoyable!

KNOW

Words and expressions relating to Chinese and Western literature

- The Pattern 一方面..., 一方面...
- The Adverb 可
- The Pattern 对...来说
- The Pattern 管...叫...
- The Pattern 任何...都...
- The Expression 更别说...了
- The Pattern 尽管...不过...
- The Pattern 不管..., 都...
- The Pattern 不是..., 就是...
- The Adverb 到底
- The Adverb 根本
- The Pattern V 来 V 去
- 可 can be used in many different ways.
- 到底, When used in a sentence, it conveys a feeling of impatience or annoy

DO

- Introduce literature.
- Introduce classics and authors.
- Talk about homework and school.
- Express appreciation for literature.
- Recommend a book.
- Retell a story.
- Talk about insects.
- Express opinion.
- Discuss similarities and differences.
- Talk about cold weather.
- Talk about a performance.
- Describe someone's characteristics
- Use sentence patterns 一方面... 一方面, 对...来说, 管...叫, 任何...都..., 尽管...不过..., 不管..., 都..., 不是..., 就是..., V 来 V 去, when speaking and writing about Chinese and Western Literature.
- Use 可, 更别说...了, 到底, 根本 properly when speaking and writing about Chinese and Western Literature.

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"CAN DO" Statements

Intermediate Mid

INTERPRETIVE COMMUNICATION

- I can understand the main idea and key information in short straightforward informational texts.
- I can understand the main idea and key information in short straightforward fictional texts.
- I can identify the main idea and key information in short straightforward conversations.

INTERPERSONAL COMMUNICATION

- I can exchange information in conversations on familiar topics and some researched topics, creating sentences and series of sentences and asking a variety of follow-up questions.
- I can interact with others to meet my needs in a variety of familiar situations, creating sentences and series of sentences and asking a variety of follow-up questions.
- I can exchange preferences, feelings, or opinions and provide basic advice on a variety of familiar topics, creating sentences and series of sentences and asking a variety of follow-up questions.

PRESENTATIONAL COMMUNICATION

- I can tell a story about my life, activities, events, and other social experiences, using sentences and series of connected sentences.
- I can state my viewpoint about familiar topics and give some reasons to support it, using sentences and series of connected sentences.
- I can give straightforward presentations on a variety of familiar topics and some concrete topics I have researched, using sentences and series of connected sentences.

Common Student Misconceptions for this Unit

Students might mistakenly believe:

- that the East and the West have similarities in terms of aesthetic viewpoints.

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- that tanning is also popular in China.
- that Valentine's Day is also on February 14 in China.

Unit Assessment

Performance Assessment

Task Overview: (directions for teachers, including what the task is, how it's authentic, how it might be differentiated, materials, etc.)

Interpretative task:

Read the following paragraph on Chinese literature, then complete the activities that follow:

- Keyword recognition
- Main ideas
- Supporting details
- Organizational features
- Guessing meaning from text
- Inferences
- Author's perspective
- Comparing cultural perspectives
- Personal reaction to the text

Other (Formative, quizzes, tests, etc.)

- Unit 4 Quiz A
- Unit 4 Quiz B
- Unit 4 Test
- in-class interpretive, interpersonal, and presentational communication activities.

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Interpersonal Task:

Literary Café Conversation

Imagine you are patrons at a literary café where you discuss your chosen literary works over coffee or tea. Engage in a structured conversation where you introduce and summarize the Chinese and Western literary works you selected, discuss the historical, cultural, and philosophical contexts that influenced each work, and compare and contrast themes, character development, and narrative techniques between the two works.

Presentational Task

Whether it is a book or a performance, literature and the arts have a deep impact on our lives. Write an essay describing your favorite character, poet, author, or performer. How would you describe that person in terms of their personality and opinions? Why does that persona appeal to you?

Student Directions:

Unit 4 IPA

Rubrics for interpretive, interpersonal, and presentational communication.

Can Do Statements

Interpretative Mode:

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I can interpret much information from a text about Chinese literature.

I can find specific information and answer questions.

Presentational Mode:

I can describe a favorite character, poet, author, or performer.

I can describe a person's personality traits. I can convey my opinion.

Interpersonal Mode:

I can compare and contrast Western and Chinese novels, poetry, and performing arts.

I can convey my personal preference, and react to other people's preference.

Supplemental Materials and Resources

Texts

Required Texts

UConn ECE Unit 4 Organizer

Title	Author	Rationale	Lexile Level (where applicable)
<i>Zhen Bang 3</i>	Margaret M. Wong	ACTFL standards aligned	
Suggested Texts			
Harvest - Intermediate Chinese	Jialu Xu	Good authentic reading materials and other resources	
Fiveable - AP Chinese	https://library.fiveable.me/ap-chinese	authentic materials align with the six themes of the UConn ECE course	

Learning Plan	
Required Learning Activities	
<i>In Order to Learn:</i>	<i>Students will:</i>
<i>In order to learn the vocabulary of</i> <ul style="list-style-type: none"> • Western literature • Famous authors • Winter scenery • Chinese literature and types • Performance • Adjectives • Insects • Characteristics/temperament • Gender 	<ul style="list-style-type: none"> • do interactive activities on Quizlet, Gimkit, Blooket, Wordwall, etc. • make sentences using these characters • read sentences made with these characters • rearrange sentences with these characters • describe the pictures provided with the characters and phrases learned • listen and match what you heard with the pictures provided • describe the pictures with the vocab learned • roleplay

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<p>the sentence structures of:</p> <ul style="list-style-type: none"> • 一方面。。。另一方面 • Subject + 可 + Adjective/Adverb/Verb • 对。。。来说 • 管。。。叫 • 任何。。。都 • 更别说。。。了 • 尽管。。。不过 • 不管。。。都 • 到底 • 根本 • Verb + 来 + Verb + 去 	<ul style="list-style-type: none"> • make sentences based on the pictures provided • describe the pictures provided with sentence structures learned • make conversations with the pictures provided • watch the videos of the authentic conversations using these sentence structures • listen to the videos, read out loud, understand and interpret them • rewrite these conversations with information related to students • role play
<p><i>Essential Language Functions</i></p> <ul style="list-style-type: none"> • Talk about cold weather • Discuss a performance • Support an opinion • Express appreciation for literature • Compare and contrast • Describe someone's characteristics • Re-tell a story • Discuss literature and authors • Talk about insects 	<p>In modes of interpretive, interpersonal, and presentational</p> <p>Interpretative communication</p> <ul style="list-style-type: none"> • listen or read the dialogues and choose the right pictures or choose the right answers • listen or read posters, ads, newspaper articles, rules, flyers, websites, etc., and answer questions <p>Interpersonal Speaking</p> <ul style="list-style-type: none"> • With a classmate, take turns asking and answering questions regarding literature. The conversation should be in Chinese except for pronouns. • Create a table and survey five of your classmates to find out what type of person they prefer. Report your results to the class. • working in groups of four to five students, choose three different insects to research. Discuss the following with your group: the insect's life habits, food, natural enemy, how they protect themselves and what are their unique features. • find a partner and choose an insect from the lesson. Create a mini-debate with your partner and discuss the insect as beneficial or harmful, where you each take a different stance. • Read a Chinese Valentine's Day Poster and decide if the provided statements that follow are true or false. <p>Presentational communication</p>

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	<ul style="list-style-type: none"> Three students will act as judges and the rest of the class will act as contestants for a class talent show. The contestants will need to prepare a short talent demonstration (bonus points for doing a Chinese language talent). The contestant must first introduce themselves along with the name of their performance. The judges must give their reactions; finally, they must say the score in Chinese (10 is the best). After each performance, one judge must be rotated out to become a contestant until everyone has been a judge.
<i>to become communicators</i>	<ul style="list-style-type: none"> speak as much Chinese as possible during class. have discussions and debates in pairs or small groups. write journals about daily experiences, thoughts, and reflections in Chinese.
<i>to become problem solvers</i>	<ul style="list-style-type: none"> discuss complex cultural issues or debates on contemporary topics. analyze the scenario of real-life case studies related to the Chinese language and culture, identify the problem, and propose solutions in Chinese. play language-related games or culturally-themed puzzles.
<i>to become Empathizers</i>	<ul style="list-style-type: none"> Compare Chinese culture with their own cultures. Discuss the similarities and differences in values, emotions, and social norms to foster empathy. discuss challenging topics or empathy-related activities like writing letters from the perspective of a Chinese character. share personal experiences related to Chinese culture and language to connect on a personal level.
Suggested Learning Activities	
<i>In order to:</i>	<i>Students will:</i>
<i>improve their interpretive, interpersonal, and presentational skills</i>	<ul style="list-style-type: none"> use these <u>resources</u> to improve their presentation skills

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Revision History

Revision Date	Explanation of change(s) made to document

UConn ECE Unit 5 Organizer

Grade/Subject	11th & 12th Grade/UConn ECE Chinese
Unit Title	保护地球 Preserving Our Earth
Overview of Unit	The goal of this unit is to improve students' proficiency in the Chinese language through advanced vocabulary, grammar, and cultural understanding centered on the theme of Our Environment, using engaging activities to develop language skills and deepen cultural insights in this context.
Pacing	6-7 weeks
ACTFL Proficiency Target	Intermediate Mid

Background Information For The Teacher (Unit Overview)

Rationale:

The unit on "Preserving Our Earth" is an essential component of the UConn Early College Experience class for Chinese language and culture, as it serves several important purposes. Firstly, it is crucial for students to understand the global challenge of environmental preservation and the impact it has on our daily lives. By incorporating this unit into the curriculum, students develop a sense of responsibility and awareness regarding their own actions and their contribution to environmental sustainability.

By engaging with this unit, students will develop and enhance their language skills according to the ACTFL Intermediate Mid standards. In terms of interpretive communication, students will read and analyze authentic texts on environmental issues in Chinese, including news articles, essays, and scientific reports. They will be able to comprehend and interpret information, identify main ideas, and make connections to their own experiences.

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In terms of interpersonal communication, students will engage in conversations and discussions about environmental topics, both in small groups and with native Chinese speakers. They will practice expressing their opinions, engaging in debates, and negotiating solutions, all while using appropriate vocabulary and cultural references.

Key Learning/Big Ideas:

Essential Language Functions:

- Support the importance of protecting the environment
- Talk about organic foods
- Discuss pollution
- Give advice
- Express sarcasm
- Compare and contrast festivals and holidays
- Talk about paying bills and fees

Related Structures/Patterns:

- Subject + 快 + Verb Phrase
- Subject + Verb + 着 + Object
- 何必。。。呢
- 不再。。。了
- 自从。。。以后
- 原来
- 对。。。 (没)有影响
- 与其。。。不如
- 早知道。。。就
- 再也不。。。了

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- Verb + 下

Priority Vocabulary:

- Environmental Protection
- Pollution
- Snacks
- Expenses
- Chinese holidays
- Adjectives
- Adverbs
- American Holidays

Big Ideas

- Environmental Stewardship: Emphasize the importance of protecting the environment through individual and collective actions, highlighting the role of sustainable practices in everyday life.
- Cultural Perspectives on Sustainability: Explore how different cultures approach environmental conservation, with a focus on China's green energy initiatives and the significance of national holidays in promoting environmental awareness.
- Practical Sustainability: practical steps can be taken to reduce their environmental impact, encouraging them to integrate sustainable habits into their daily routines.

Essential Questions

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Essential Questions

- How can learning Chinese help raise awareness of global environmental issues?
- What values in Chinese culture promote harmony with nature?
- How is Chinese culture reflected in proverbs and sayings (谚语)?

Core Content Standards

Content Specific Standards (NGSS, SS Framework, CCS, ACTFL, etc.)

NCSSFL-ACTFL CAN-DO STATEMENTS

Interpretative Communication - I can identify the main idea and key information in short, straightforward conversations. (Intermediate Mid)

Interpersonal Communication - I can exchange information in conversations on familiar topics and some researched topics, creating sentences and series of sentences and asking a variety of follow-up questions. (Intermediate Mid)

Presentation Communication - I can give straightforward presentations on a variety of familiar topics and some concrete topics I have researched, using sentences and a series of connected sentences. (intermediate Mid)

CT Core Literacy Standards (non-ELA)

Reading: Literature

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	<u>Reading: Information text</u> <u>Writing</u> <u>Speaking and Listening</u>
Portrait of the Graduate Characteristics	<ul style="list-style-type: none">● Collaborator● Communicator● Empathizer● Problem Solver● Planner

K-U-D

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UNDERSTANDS

Students will understand:

- People everywhere in the world are working to protect and preserve the earth.
- In China, people focus on balance, respecting the environment, and seeing how all living things are connected.
- Chinese proverbs highlight important values and life lessons about harmony, respect, and wisdom.

KNOW

- Words and expressions relating to our environment
- The Adverb 快
- The Pattern V 着
- The Pattern 何必...呢?
- The Pattern 不再...了
- The Pattern 自从...以后
- The Adverb 原来
- The Pattern ...对...(没)有影响
- The Pattern 与其...,不如...
- The Pattern 早知道...就
- The Pattern 再也不...了
- The Compliment 下

DO

- Give advice.
- Make excuses.
- Emphasize the importance of protecting the environment.
- Talk about pollution.
- Talk about organic foods.
- Express sarcasm.
- Talk about festivals and holidays.
- Talk about Earth Day.
- Talk about paying bills and fees.
- Use sentence patterns V 着, 何必...呢? 不再...了, 自从...以后, 对...(没)有影响, 与其...,不如..., 早知道...就, 再也不...了 when speaking and writing about environment related topics.
- Use 快, 原来, 下 properly when speaking and writing about environment-related topics.
- Use 在 and 着 properly when speaking and writing about environment-related topics.

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- Use 快 and 马上 properly when speaking and writing about environment-related topics.

"CAN DO" Statements

Intermediate Mid

INTERPRETIVE COMMUNICATION

- I can understand the main idea and key information in short straightforward informational texts.
- I can understand the main idea and key information in short straightforward fictional texts.
- I can identify the main idea and key information in short straightforward conversations.

INTERPERSONAL COMMUNICATION

- I can exchange information in conversations on familiar topics and some researched topics, creating sentences and series of sentences and asking a variety of follow-up questions.
- I can interact with others to meet my needs in a variety of familiar situations, creating sentences and series of sentences and asking a variety of follow-up questions.
- I can exchange preferences, feelings, or opinions and provide basic advice on a variety of familiar topics, creating sentences and series of sentences and asking a variety of follow-up questions.

PRESENTATIONAL COMMUNICATION

- I can tell a story about my life, activities, events, and other social experiences, using sentences and series of connected sentences.
- I can state my viewpoint about familiar topics and give some reasons to support it, using sentences and series of connected sentences.
- I can give straightforward presentations on a variety of familiar topics and some concrete topics I have researched, using sentences and series of connected sentences.

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Common Student Misconceptions for this Unit

Students might mistakenly believe:

- 在 and 着 both indicate something is happening
- 快 and 马上 both indicate immediately
- Christmas has been celebrated for a long time in China and is celebrated in China the same way as it is here in the U.S.
- Tipping in China is as common as in the U.S.
- 意思=meaning
- In China, people pay property taxes.

Unit Assessment

Performance Assessment

Task Overview

Interpretative task:

You are an exchange student in China. A member of your host family showed you a recycling poster in Chinese. Please read the poster and complete the following activities

- Keyword recognition
- Main ideas
- Supporting details

Other

- Unit 5 Quiz A
- Unit 5 Quiz B
- Unit 5 Test
- in-class interpretive, interpersonal, and presentational communication activities.

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- Organizational features
- Guessing meaning from text
- Inferences
- Author's perspective
- Comparing cultural perspectives
- Personal reaction to the text

Interpersonal Task

How do you “reduce, reuse, and recycle”? Record a video where you and 2 other classmates discuss and promote the importance of being green. Include topics such as energy-saving ideas, recycling and upcycling, environmental impact, etc. (Teachers may choose to supply each student with a supplemental vocabulary list).

Presentational Task

Let's celebrate Earth Day by spending the day outside! With a classmate, research a region in China where you and your partner would like to practice your Chinese language skills. Once you and your classmate find a region you both are interested in exploring, do some additional research on outdoor activities that are enjoyed in that region in China. Lastly, create an Earth Day outdoor travel guide focused on the region's topography and outdoor activities. Please be sure to include a map of the region and colorful

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illustrations with captions. Once the Earth Day travel guide is complete, you and your classmate present the guide to your class.

Student Directions:

IPA Unit 5

Rubrics for interpretive, interpersonal, and presentational communication.

Can Do Statements

Interpretive:

- I can read and understand a recycling poster in Chinese.
- I can find specific information and answer questions.

Interpersonal:

- I can communicate and promote via video the importance of being green.
- I can discuss actions that impact the environment.

Presentational:

- I can collaborate on a research project about a region in China.
- I can research popular outdoor activities in a region in China.
- I can create an outdoor travel guide and present it to my classmates.

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Supplemental Materials and Resources

- online textbooks, online workbooks, character practice books
- Games such as Quizlet, Blooket, Gimkit, wordwall

Texts

Required Texts

Title	Author	Rationale	Lexile Level (where applicable)
<i>Zhen Bang 3</i>	Margaret M. Wong	ACTFL standards aligned	

Suggested Texts

Harvest - Intermediate Chinese	Jialu Xu	Good authentic reading materials and other resources	
Fiveable - AP Chinese	https://library.fiveable.me/ap-chinese	authentic materials align with the six themes of the UConn ECE course	

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Learning Plan	
Required Learning Activities	
<i>In order to learn:</i>	<i>Students will:</i>
<p><i>the vocabulary of</i></p> <ul style="list-style-type: none"> • Environmental Protection • Pollution • Snacks • Expenses • Chinese holidays • Adjectives • Adverbs • American Holidays 	<ul style="list-style-type: none"> • do interactive activities on Quizlet, Gimkit, Blooket, Wordwall, etc. • make sentences using these characters • read sentences made with these characters • rearrange sentences with these characters • describe the pictures provided with the characters and phrases learned • listen and match what you heard with the pictures provided • describe the pictures with the vocab learned • roleplay
<p><i>the sentence structures of</i></p> <ul style="list-style-type: none"> • Subject + 快 + Verb Phrase • Subject + Verb + 着 + Object • 何必。。。呢 • 不再。。。了 • 自从。。。以后 • 原来 • 对。。。 (没)有影响 • 与其。。。不如 	<ul style="list-style-type: none"> • make sentences based on the pictures provided • describe the pictures provided with sentence structures learned • make conversations with the pictures provided • watch the videos of the authentic conversations using these sentence structures • listen to the videos, read out loud, understand and interpret them • rewrite these conversations with information related to students • roleplay

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<ul style="list-style-type: none"> • 早知道。。。就 • 再也不。。。了 • Verb + 下 	
<p><i>Essential Language Functions of</i></p> <ul style="list-style-type: none"> • Support the importance of protecting the environment • Talk about organic foods • Discuss pollution • Give advice • Express sarcasm • Compare and contrast festivals and holidays • Talk about paying bills and fees 	<p>Do activities in modes of interpretive, interpersonal and presentational</p> <p>Interpretative communication</p> <ul style="list-style-type: none"> • listen or read the dialogues and choose the right pictures or choose the right answers • listen or read posters, ads, newspaper articles, rules, flyers, websites, etc., and answer questions <p>Interpersonal Speaking</p> <ul style="list-style-type: none"> • Find out the different kinds of pollution sources in your classmates' lives. Draw a table. In the Table, write the names of five classmates, then ask them about the possible sources that may cause water pollution, noise pollution, and air pollution and possible solutions. • With a classmate, talk about the recycling process at their houses. Take turns asking and answering the questions. • Working in pairs, imagine you and your partner are planning to rent an apartment together. You will have a budget of \$700 per month. Your apartment's monthly rent is \$475. You will be given a list of extra monthly fees or bills. Discuss in Chinese which necessities are more important to you and which you can live without, as you cannot go over budget. <p>Presentational communication</p> <ul style="list-style-type: none"> • Imagine that you run a new recycling company that is in charge of the local area. Design a flyer for your company. • Find a photo or image from the Internet or a magazine that you feel displays something that could cause environmental harm or something that is not "green". Bring the image to the class and share it with your classmates. With a partner or small group, look at each other's photographs and have a discussion about the

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	<p>problems found in the photo, what makes it environmentally unfriendly, and how would you solve the problem.</p> <ul style="list-style-type: none"> ● In groups of five students, pick four holidays of the year. Create an organized plan for how you will celebrate them.
<i>to become communicators</i>	<ul style="list-style-type: none"> ● speak as much Chinese as possible during class. ● have discussions and debates in pairs or small groups. ● write journals about daily experiences, thoughts, and reflections in Chinese.
<i>to become problem solvers</i>	<ul style="list-style-type: none"> ● have discussions on complex cultural issues or debates on contemporary topics. ● analyze the scenario of real-life case studies related to the Chinese language and culture, identify the problem, and propose solutions in Chinese. ● play language-related games or culturally-themed puzzles.
<i>to become Empathizers</i>	<ul style="list-style-type: none"> ● Compare Chinese culture with their own cultures. Discuss the similarities and differences in values, emotions, and social norms to foster empathy ● discuss challenging topics or empathy-related activities like writing letters from the perspective of a Chinese character. ● share personal experiences related to Chinese culture and language to connect on a personal level.
<i>to become Collaborators</i>	<ul style="list-style-type: none"> ● work on group projects such as creating presentations, skits, or reports related to the Chinese language and culture. ● work on group writing tasks, such as co-authoring essays or stories, to improve writing skills and teamwork. ● review and edit each other's work, promoting teamwork and improving language proficiency.
Suggested Learning Activities	
<i>In order to learn:</i>	<i>Students will:</i>

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<i>improve their interpretive, interpersonal, and presentational skills</i>	<ul style="list-style-type: none">Students will use these <u>resources</u> to improve their presentation skills.
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Revision History	
Revision Date	Explanation of change(s) made to document

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Grade/Subject	11th & 12th Grade/UConn ECE Chinese
Unit Title	现代中国 Modern China
Overview of Unit	The goal of this unit is to improve students' proficiency in the Chinese language through advanced vocabulary, grammar, and cultural understanding centered on the theme of China in Modern Times, using engaging activities to develop language skills and deepen cultural insights in this context.
Pacing	6-7 weeks
ACTFL Proficiency Target	Intermediate Mid

Background Information For The Teacher (Unit Overview)

Rationale:

The unit on "China in modern times" is crucial for students enrolled in the UConn Early College Experience class for Chinese language and culture. This unit will be taught to provide students with a comprehensive understanding of China's contemporary society, politics, economy, and culture. By studying this unit, students will gain valuable insights into China's rapid development, its global impact, and the challenges it faces in the modern world. According to the ACTFL interpretive communication intermediate-mid standards, students will be able to understand main ideas and some supporting details when listening to or reading authentic materials on contemporary Chinese topics. Moreover, the unit on "China in modern times" enables students to develop interpersonal communication skills by engaging in discussions, debates, and interviews with their peers, teachers, and native Chinese speakers. They can apply their knowledge and understanding of China's modern context to express their opinions,

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negotiate meaning, and build cultural connections. Lastly, the presentational communication intermediate-mid standards encourage students to effectively present information about contemporary China, both orally and in writing.

Key Learning/Big Ideas:

Essential Language Functions:

- Describe an outdoor environment
- Discuss mass transit problems during Spring Festival
- Explain the current direction of China's modern development
- Demonstrate China's contribution and importance to the world
- Analyze problems
- Discuss population density
- List household items
- Talk about Chinese history
- Make comparisons

Related Structures/Patterns:

- 随着
- 即使。。。也 / 还
- X + 分之 + Y
- 再加上
- Subject + 正(在) + Verb Phrase + 中
- Verb + 满
- Verb + 得 / 不 + 起
- Sentence, Noun + 啊, Noun + 啊, Noun + 啊
- 一 MW 比 一 MW
- 再。。。也

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- 跟。。。比起来
- 就是。。。也
- 随 + Noun

Priority Vocabulary:

- Natural environment
- Topography
- Transportation
- Regions in China
- Adjectives
- Characteristics/temperament
- Household items

Big Ideas

- Transformation and Development: Explore China's remarkable transformation from an agrarian society to a global economic powerhouse, highlighting the country's modernization efforts, technological advancements, and infrastructure development.
- Cultural Diversity and Unity: Recognize the rich cultural diversity within China's vast territory while appreciating the shared identity and sense of national unity that binds its diverse population together.
- Global Engagement and Influence: Examine China's increasing global influence in various spheres, including economics, trade, technology, and culture, and its evolving role on the world stage.

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Essential Questions

Essential Questions

- How has technology changed the daily lives of humans?
- How has China's rapid economic development and urbanization transformed the country in modern times?
- How do films, music, and media from China help bridge cultural gaps?

Core Content Standards

Content Specific Standards (NGSS, SS Framework, CCS, ACTFL, etc.)

NCSSFL-ACTFL CAN-DO STATEMENTS

Interpretative Communication - I can identify the main idea and key information in short, straightforward conversations. (Intermediate Mid)

Interpersonal Communication - I can exchange information in conversations on familiar topics and some researched topics, creating sentences and series of sentences and asking a variety of follow-up questions. (Intermediate Mid)

Presentation Communication - I can give straightforward presentations on a variety of familiar topics and some concrete topics I have researched, using sentences and a series of connected sentences. (intermediate Mid)

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<p><u>CT Core Literacy Standards (non-ELA)</u> Click link, then see section on right margin titled, Grades 6-12 Literacy in History/Social Studies, Science, & Technical Subjects</p>	<p><u>Reading: Literature</u></p> <p><u>Reading: Information text</u></p> <p><u>Writing</u></p> <p><u>Speaking and Listening</u></p>
<p>Portrait of the Graduate Characteristics</p>	<ul style="list-style-type: none"> ● Collaborator ● Communicator ● Empathizer ● Problem Solver ● Planner

K-U-D	
UNDERSTANDS	
<p>Students will understand:</p> <ul style="list-style-type: none"> ● Digital tools are making daily life a lot easier, speeding up communication, and giving us quick access to information. 	

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- Living standards in China have greatly improved, bustling cities have popped up, and millions of people have moved from rural areas to urban centers for better opportunities.
- Chinese movies, music, and media share unique stories and traditions that help people understand and appreciate different cultures.

KNOW

- Words and expressions relating to China in modern times
- The Pattern 随着...
- The Pattern 即使...,也...
- The Pattern ...X 分之 Y...
- The Conjunction 再加上
- The Pattern 正(在)...中
- The Complement 满
- The Pattern 起
- The Pattern ...啊,...啊,...啊
- The Pattern 一 MW 比一 MW
- The Pattern 再...也...
- The Pattern 跟...比起来
- The Pattern 就是...,也...
- The Expression 随 +N

DO

- Talk about the current direction of China's modern development.
- Describe the mass transportation problems during the Spring Festival.
- Agree with someone's opinion.
- List and analyze problems.
- Talk about population density.
- Highlight China's contribution and importance to the world.
- Talk about China's history.
- Talk about keeping in touch.
- Describe an outdoor environment.
- List important household items.
- Use sentence patterns 随着..., 即使...,也..., ...X 分之 Y..., 正(在)...中, ...啊,...啊,...啊, 一 MW 比一 MW, 再...也..., 跟...比起来, 就是...,也...when speaking and writing about China in modern times.
- Use the conjunction 再加上 properly when speaking and writing about China in modern times.
- Use the conjunction 再加上 properly when speaking and writing about China in modern times.

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- Use the expression 随 +N properly when speaking and writing about China in modern times.

"CAN DO" Statements

Intermediate Mid

INTERPRETIVE COMMUNICATION

- I can understand the main idea and key information in short straightforward informational texts.
- I can understand the main idea and key information in short straightforward fictional texts.
- I can identify the main idea and key information in short straightforward conversations.

INTERPERSONAL COMMUNICATION

- I can exchange information in conversations on familiar topics and some researched topics, creating sentences and series of sentences and asking a variety of follow-up questions.
- I can interact with others to meet my needs in a variety of familiar situations, creating sentences and series of sentences and asking a variety of follow-up questions.
- I can exchange preferences, feelings, or opinions and provide basic advice on a variety of familiar topics, creating sentences and series of sentences and asking a variety of follow-up questions.

PRESENTATIONAL COMMUNICATION

- I can tell a story about my life, activities, events and other social experiences, using sentences and series of connected sentences.
- I can state my viewpoint about familiar topics and give some reasons to support it, using sentences and series of connected sentences.
- I can give straightforward presentations on a variety of familiar topics and some concrete topics I have researched, using sentences and series of connected sentences.

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Common Student Misconceptions for this Unit

Students might mistakenly believe:

- that bicycles are the most common transportation in China.
- that China is the world factory due to the cheap labor now.
- that America is the country with the largest subway network in the world
- that in China, people can retire whenever they want
- that “制造”和“做” both mean “to make”, so they are used the same in Chinese.

Unit Assessment

Performance Assessment

Task Overview

Interpretative task:

You are learning more about China's high-speed rail (HSR) also known as Gaotie. Please Look at two different sections from the website gaotie.cn, then complete the activities

- Keyword recognition
- Main ideas
- Supporting details

Other

- [Unit 6 Quiz A](#)
- [Unit 6 Quiz B](#)
- [Unit 6 Test](#)
- in-class interpretive, interpersonal, and presentational communication activities.

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- Organizational features
- Guessing meaning from text
- Inferences
- Author's perspective
- Comparing cultural perspectives
- Personal reaction to the text

Interpersonal Task

Cultural Exchange Panel Discussion - Participate in a panel discussion with classmates, exploring the impact of modernization on various aspects of Chinese society.

Form a panel of 3-4 classmates, each panelist should prepare to discuss their chosen aspect. They will introduce their chosen aspect of modern China and its significance in contemporary society and share specific examples and data to illustrate the impact of modernization on their chosen area.

They will engage in dialogue with other students, asking questions and offering perspectives to deepen understanding.

Presentational Task

Build a MTR (Massive Transit Railway)

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Working in groups of three or four, make a plan to build an MTR in your city or town. Once you have decided everything, make a small map, and present your plan to your class. You will want to discuss the following points in Chinese:

- areas in your town with heavy pedestrian traffic
- landmarks or other places of interest
- the route of the train
- the time of operation
- the price of a ticket
- the estimated cost of the project and benefits

Student Directions:

IPA Unit 6

Rubrics for interpretive, interpersonal, and presentational communication.

Can Do Statements

Interpretive:

- I can understand most of what is written on a transportation website.
- I can use the information I understand to answer questions.

Interpersonal:

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- I can have a conversation about Chinese domestic brands and foreign brands in China.
- I can discuss the significance of Chinese domestic brands their impact on Chinese society and the role of Chinese consumers.

Presentation:

- I can research and present popular Chinese domestic brands and foreign brands in China.
- I can describe the significance of Chinese domestic brands and their impact on Chinese society.
- I can state the role of the Chinese consumer.

Supplemental Materials and Resources

- online textbooks, online workbooks, character practice books
- Games such as Quizlet, Blooket, Gimkit, wordwall

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Texts			
Required Texts			
Title <i>Include link where applicable</i>	Author	Rationale	Lexile Level (where applicable)
<i>Zhen Bang 3</i>	Margaret M. Wong	ACTFL standards aligned	
Suggested Texts			
Harvest - Intermediate Chinese	Jialu Xu	Good authentic reading materials and other resources	
Fiveable - AP Chinese	https://library.fiveable.me/ap-chinese	authentic materials align with the six themes of the UConn ECE course	

Learning Plan	
Required Learning Activities	
<i>In order to learn:</i>	<i>Students will:</i>
<i>the vocabulary of</i> • Natural environment	• do interactive activities on Quizlet, Gimkit, Blooket, Wordwall, etc.

UConn ECE Unit 6 Organizer

<ul style="list-style-type: none"> • Topography • Transportation • Regions in China • Adjectives • Characteristics/temperament • Household items 	<ul style="list-style-type: none"> • make sentences using these characters • read sentences made with these characters • rearrange sentences with these characters • describe the pictures provided with the characters and phrases learned • listen and match what you heard with the pictures provided • describe the pictures with the vocab learned • roleplay
<p>the sentence structures of</p> <ul style="list-style-type: none"> • 随着 • 即使。。。也 / 还 • X + 分之 + Y • 再加上 • Subject + 正(在)+ Verb Phrase + 中 • Verb + 满 • Verb + 得 / 不 + 起 • Sentence, Noun + 啊, Noun + 啊, Noun + 啊 • 一 MW 比 一 MW • 再。。。也 • 跟。。。比起来 • 就是。。。也 • 随 + Noun 	<ul style="list-style-type: none"> • make sentences based on the pictures provided • describe the pictures provided with sentence structures learned • make conversations with the pictures provided • watch the videos of the authentic conversations using these sentence structures • listen to the videos, read out loud, understand and interpret them • rewrite these conversations with information related to students • roleplay

UConn ECE Unit 6 Organizer

<p><i>Essential Language Functions of</i></p> <ul style="list-style-type: none"> • Describe an outdoor environment • Discuss mass transit problems during the Spring Festival • Explain the current direction of China's modern development • Demonstrate China's contribution and importance to the world • Analyze problems • Discuss population density • List household items • Talk about Chinese history • Make comparisons 	<p>Complete activities in modes of interpretive, interpersonal, and presentational</p> <p>Interpretative communication</p> <ul style="list-style-type: none"> • listen or read the dialogues and choose the right pictures or choose the right answers • listen or read posters, ads, newspaper articles, rules, flyers, websites, etc., and answer questions <p>Interpersonal Speaking</p> <ul style="list-style-type: none"> • With a partner, take turns asking and answering questions about the increasing rate of the population in some provinces of China • survey four of your classmates and ask them about the "made in China" goods around them. The goods could be their clothes, shoes, accessories, or their school supplies. Then ask them what Chinese brands they have at home. <p>Presentational communication</p> <ul style="list-style-type: none"> • work in groups of three or four to make a plan to build a MTR in your town or city. Once you have decided everything, make a small map and present your MTR plan to the class. • With a partner, think of a scenario and create an impromptu two-minute dialogue to perform in front of the class. Once the scene is finished, you will start over and re-do the scene with new characteristics given to you by your classmates. • think about a person who influences your life. Then make a one-minute video blog in Chinese to explain how you know the person, what is the person's best quality, and why you want to follow in this person's footsteps.
<p><i>In order to become Collaborators</i></p>	<ul style="list-style-type: none"> • work on group projects such as creating presentations, skits, or reports related to the Chinese language and culture. • work on group writing tasks, such as co-authoring essays or stories, to improve writing skills and teamwork. • review and edit each other's work, promoting teamwork and improving language proficiency.
<p><i>to become communicators</i></p>	

UConn ECE Unit 6 Organizer

	<ul style="list-style-type: none"> • speak as much Chinese as possible during class. • have discussions and debates in pairs or small groups. • write journals about daily experiences, thoughts, and reflections in Chinese.
<i>to become Empathizers</i>	<ul style="list-style-type: none"> • Compare Chinese culture with their own cultures. Discuss the similarities and differences in values, emotions, and social norms to foster empathy • discuss on challenging topics or empathy-related activities like writing letters from the perspective of a Chinese character. • share personal experiences related to Chinese culture and language to connect on a personal level.
Suggested Learning Activities	
<i>In order to learn:</i>	<i>Students will:</i>
<i>to improve their interpretive, interpersonal, and presentational skills</i>	<ul style="list-style-type: none"> • Use these <u>resources</u> to improve presentation skills

Revision History

Revision Date	Explanation of change(s) made to document

February 2025

January Ticket Summary

Tickets addressed
and closed: 364

Tickets open: 12

HS Student Help Desk

Students helped: 394

Amity Regional School
District No. 5

25 Newton Road

Woodbridge, CT 06525

Phone: 203-397-4817

Fax: 203-397-4864

Amity Regional School District No. 5

Technology Department Monthly Report

Completed Projects:

- Additional card readers for door access have been completed. Installation of door hardware was finished this week. 2 new doors in Orange and 1 in Bethany now allow access via staff ID cards.
- Reconfiguration of network switches has been completed to address intermittent phone issues at the two middle schools; after monitoring the last month the solution seems to have addressed the issues.
- Magic School AI has been implemented and made available for teacher use; the system is being used and metrics are being actively gathered to help the District make informed decisions about the solution moving forward.
- Initial Technology Budget has been built and presented.

Projects in process:

- Currently meeting with vendors that we made contact with at the annual FETC conference in January. We are in the initial stages of exploring solutions for campus security, AI as a tool for administrators and more robust hall pass systems.
- Two new District wide AI tools are implemented and currently being evaluated and monitored.
 - Magic School
 - PowerBuddy
- Website redesign is ongoing and major updates have been completed
- Technology Budget
 - Requests are submitted and entered into the new Technology Budget
 - Full audit of current budget is complete in preparation for building the technology budget



CLEAN

SAFE

HEALTHY

SCHOOLS

Amity Regional School
District No. 5

25 Newton Road

Woodbridge, CT 06525

Phone: 203-397-4817

Fax: 203-397-4864



Amity Regional School District No. 5

Facilities Department Monthly Report

Completed Projects:

- The second VFD for air handler one at the high school was replaced by an outside contractor.
- A new circuit was run in the ARHS kitchen to power the new rapid cook oven by our in-house electrician.
- A few door repairs were done at AMSO by our in house building maintainer.
- The walk in cooler door at ARHS was repaired by an outside vendor.
- A motor for an air handler at ARHS was repaired by our in house building mechanics.
- Water filters are being replaced on the bottle filling stations District wide.

Projects in Process:

- Facilities is working with an outside contractor to repair a few areas in the main driveway at ARHS.
- The District is working with the Town of Woodbridge to address concerns with the fuel cell and microgrid. A was a meeting held on January 10, 2025 with UI, Fuel cell, the Town of Woodbridge and Amity. There is another meeting scheduled for February 10, 2025. At this point, the Town is in contact with the state regarding the issue.
- The fire pump in Bethany needs to be replaced. The District is working with Van Zelm engineers to draft specifications so the project can go out to bid.
- Facilities is working with Van Zelm and Silver Petrucelli to design the scope of work for the HVAC improvements as part of the Media Center upgrade.
- The District met with Titan Energy to discuss solar options at ARHS. Another presentation from Titan Energy with the Board of Ed is scheduled for February 10, 2025.

Outstanding issues to be addressed:

- Bid openings for the fire suppression room at the high school will be opened on February 10th. Bids will be reviewed, and a plan to move forward will be presented at a later date.



Amity Regional School District #5

Meeting Materials - February 2025

This report is intended for the exclusive use of clients or prospective clients (the "recipient") of Fiducient Advisors and the information contained herein is confidential and the dissemination or distribution to any other person without the prior approval of Fiducient Advisors is strictly prohibited. Information has been obtained from sources believed to be reliable, though not independently verified. Any forecasts are hypothetical and represent future expectations and not actual return volatilities and correlations will differ from forecasts. This report does not represent a specific investment recommendation. The opinions and analysis expressed herein are based on Fiducient Advisor research and professional experience and are expressed as of the date of this report.

Please consult with your advisor, attorney and accountant, as appropriate, regarding specific advice. Past performance does not indicate future performance and there is risk of loss.

Table of Contents



Section 1 4Q 2024 Executive Summary

Section 2 Appendix

- Additional Plan Information & Disclosures



Market Themes

Stubborn Inflation and Potential for Reignition?

Substantial progress has been made on the inflation front, but levels remain stubbornly above the Fed's 2% target, now sitting at 2.7%¹. Technological and productivity advancements help price stability, but a host of other factors are increasing the risks of inflation potentially reigniting. Shifting expectations away from an easing Fed or moderating inflation may impact price and volatility and warrants monitoring.

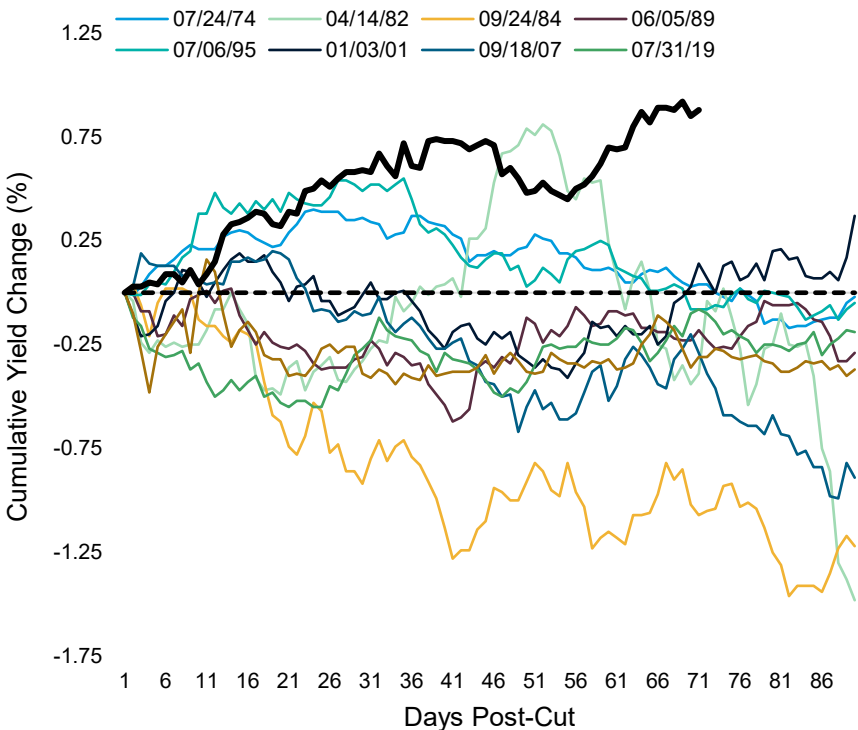
Inflationary

- Deglobalization/onshoring
- Political factors (e.g., potential tariffs, immigration policy, etc.)
- Growing deficits
- Money supply
- Decarbonization

Disinflationary

- Slowing population growth
- Technology
- AI productivity enhancement

Cumulative Change of 10-Year U.S. Treasury Yield
90 Trading Days After First Fed Cut

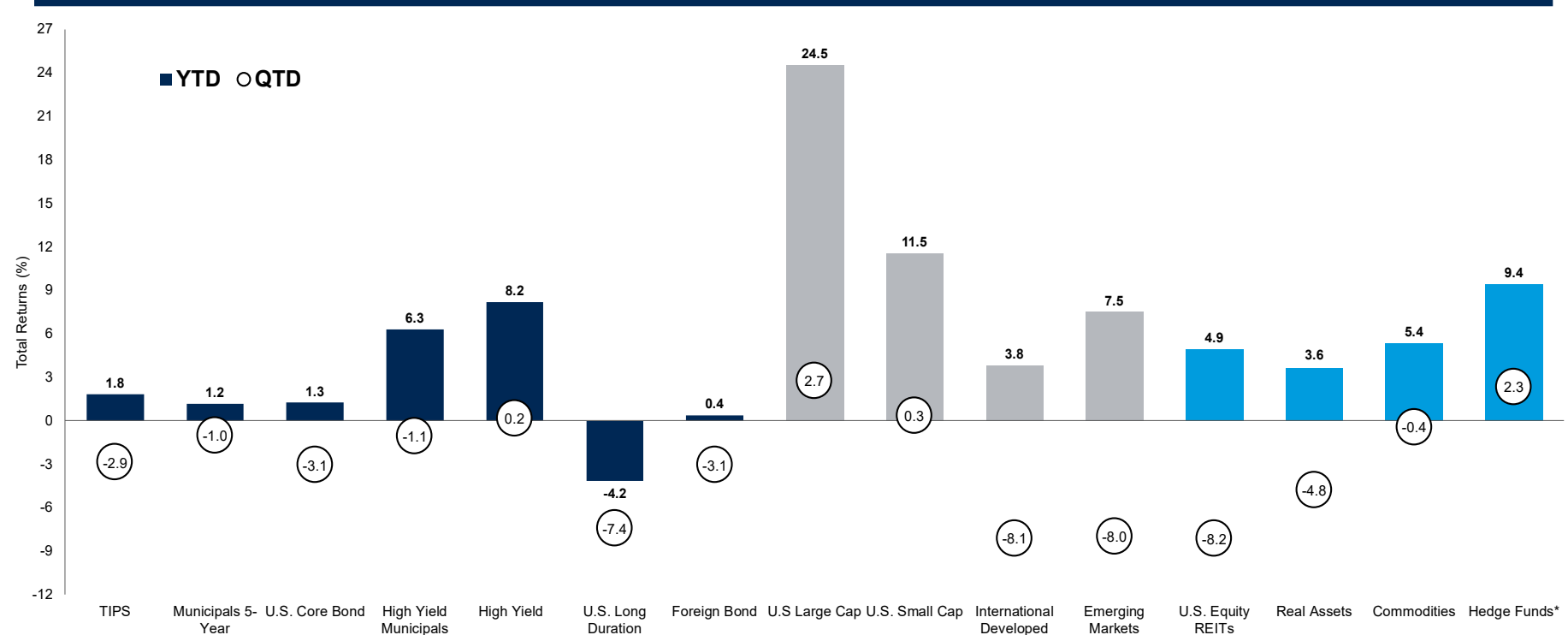


Source: FactSet. As of December 31, 2024.

1) FactSet, Bureau of Labor Statistics. As of November 30, 2024.



Asset Class Returns



Source: Morningstar Direct. As of December 31, 2024. *Hedge fund returns as of November 30, 2024.

Real Asset / Alternatives (4Q 2024)

- Rising interest rates were a large headwind for REITs in the fourth quarter.
- Rising energy prices were not enough to offset weakness in metals and agriculture and commodities were modestly negative in the quarter.
- + Hedge funds (reported as of November) had a strong two months to start the quarter. Heightened market volatility provided a boost to the space, offering favorable trading opportunities throughout the period.



Fiduciary Governance Calendar

The fiduciary governance calendar is designed to create a disciplined framework around governance, which helps ensure that over the course of a calendar year key fiduciary obligations and responsibilities are being met.



*Liquidity analysis is provided only for portfolios with marketable alternatives and/or private equity.



2025-2044 Twenty-Year Outlook

20-Year Market Forecasts

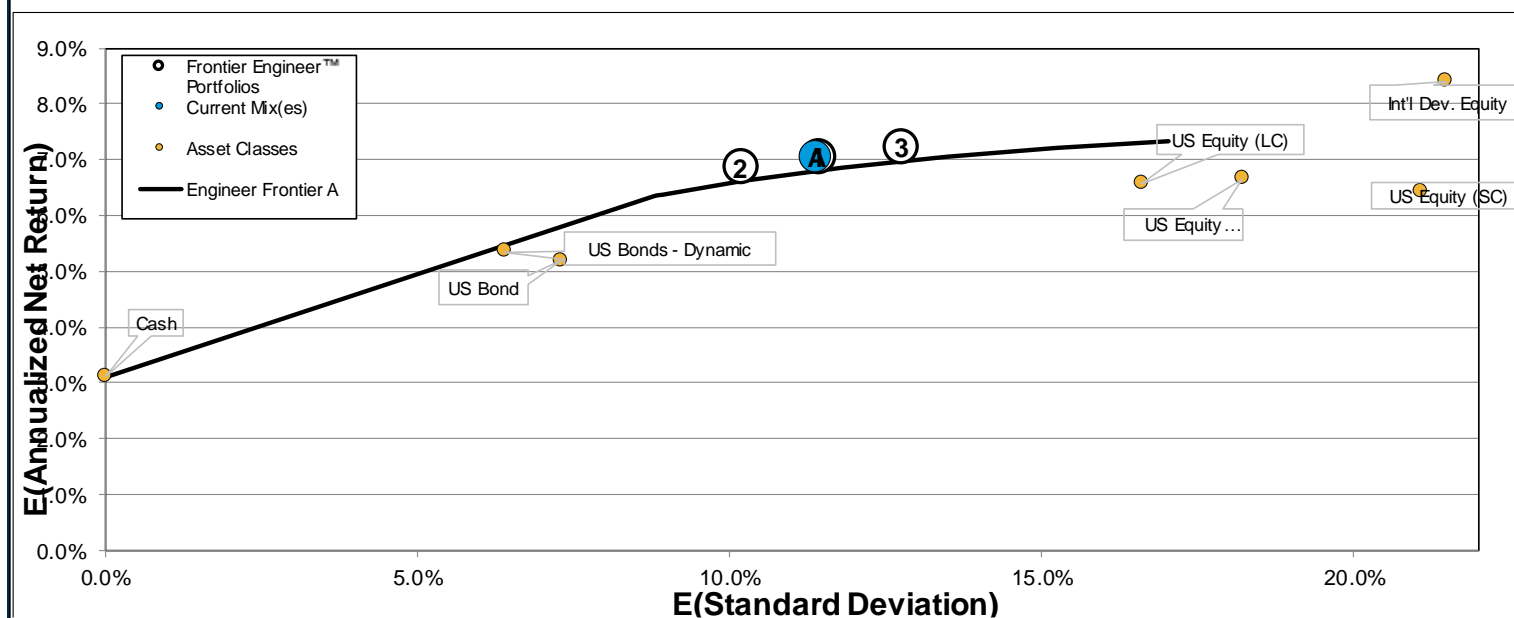
20-Year Market Forecasts		2025	2024	Y / Y Change	
Fixed Income	Inflation continued to moderate in 2024 and the Federal Reserve began to ease monetary conditions by cutting rates in September. Yields fell broadly across the fixed income landscape resulting in lower return expectations from the year prior, but still healthy overall levels.	U.S. Bonds	5.2%	5.9%	-0.7%
		TIPS	4.8%	5.5%	-0.7%
		Dynamic Bonds ¹	5.3%	6.8%	-1.5%
	High yield was one of the best performing fixed income asset classes in 2024. The change in forecast was further impacted by tighter credit spreads (the additional yield above Treasuries), which now approach pre-GFC levels ⁴ .	High Yield Bonds	6.8%	8.0%	-1.2%
		Global Bonds	5.3%	5.9%	-0.6%
	The municipal bond market experienced similar dynamics, resulting in lower forecasts for 2025.	Muni Bond ²	5.6%	6.7%	-1.1%
		Muni High Yield ²	9.3%	10.7%	-1.4%
Global Equity	Equity forecasts were lower across regions. U.S. equities saw valuations rise, particularly driven by U.S. large cap. Valuations moved higher abroad as well, but not to the same extent as domestic markets. Valuations remain well above long-term averages in the U.S., while non-U.S. markets sit closer to average over the last 20 years.	U.S. All Cap	6.6%	7.3%	-0.7%
		Intl Developed Equity	7.5%	8.2%	-0.7%
		Emerging Markets	8.6%	10.1%	-1.5%
Real Assets & Alternatives	Real assets experienced momentum in 2024. Inflation fell from the start of the year, but positive price movements in underlying segments and lower yields have led to reduced return expectations for the asset class.	Real Estate	7.1%	7.8%	-0.7%
		Broad Real Assets ³	7.6%	8.3%	-0.7%
	Marketable alternatives expectations came down as both the outlook for underlying equity and fixed income asset classes fell from last year.	Marketable Alts	8.4%	9.1%	-0.7%
		Private Equity	9.6%	10.3%	-0.7%
Generally higher valuations in spite of modest deal activity have lowered our return expectation for private equity.					

1) Dynamic bonds are a blend of 33% Cash, 33% Corp HY and 34% Global Bonds. 2) Tax Equivalent yield based on highest marginal Federal tax rate (37%). 3) Broad Real Assets is 20% REITS, 20% Global Infrastructure, 20% Commodities, 20% US Bonds, 15% Corp High Yield, 5% TIPS. 4) FactSet, as of November 30, 2024. Outputs and opinions are as of the date referenced and are subject to change based on market or economic conditions. Information is intended for general information purposes only and does not represent any specific investment recommendation. Please consult with your advisor, attorney and accountant, as appropriate, regarding specific advice. There is no guarantee that any of these expectations will become actual results. For additional information on forecast methodologies, please speak with your advisor. Please see the index proxy summary slide at the end of this presentation for summary of indices used to represent each asset class. Past performance does not indicate future performance and there is a possibility of a loss.



Frontier Engineer® Analysis – Amity Pension

12/31/2024	Asset Allocation											Forecasts				Past (1/88-12/24)	
	Fixed Income	Equity	Real Assets	Alternatives	Cash	US Bond	US Bonds - Dynamic	US Equity (LC)	US Equity (MC)	US Equity (SC)	Int'l Dev. Equity	Annualized Return	Annualized Volatility	Normal 100 Year Flood*	Non-Normal 100 Year Flood**	Annualized Net Return	Annualized Volatility
Amity Pension Current Allocation (A)	40%	60%				32.0%	8.0%	30.0%	9.0%	6.0%	15.0%	7.0%	11.4%	-19%	-24%	8.6%	9.5%
Optimized Mix 1	40%	60%				30%	10%	30%	9%	6%	16%	7.1%	11.4%	-19%	-24%	8.6%	9.5%
Mix 2	50%	50%				38%	13%	25%	7%	5%	13%	6.9%	10.2%	-16%	-21%	8.2%	8.2%
Mix 3	30%	70%				23%	8%	35%	10%	7%	18%	7.2%	12.7%	-22%	-28%	9.0%	10.8%



*The expected one in a hundred worst case calendar year return based on normally distributed capital market assumptions. Greater losses are possible (1% expected likelihood).

**The expected one in a hundred worst case calendar year return based on non-normally distributed capital market assumptions (factoring in skewness & kurtosis). Greater losses are possible (1% expected likelihood). Historical Returns and Risk Metrics for each Mix represent back-tested calculations developed with the benefit of hindsight. Return calculations use an asset-weighted methodology based on the target asset allocation of each mix and the total return of index proxies used to represent each asset class and are net of fees. Historical returns are hypothetical and do not represent returns earned by a client. It is not possible to invest in an index. Please see the Frontier Engineer Hypothetical Performance Disclosures at the end of the presentation for additional information, including index proxies used to represent each asset class. Please ask for a copy of Fiducient Advisors' white paper titled 10-Year Capital Market Forecasts. Past performance does not indicate future performance and it is possible to lose money when investing. Please refer to the Capital Markets Assumptions Slide for the hypothetical alpha and hypothetical fee inputs used in the calculation methodology.

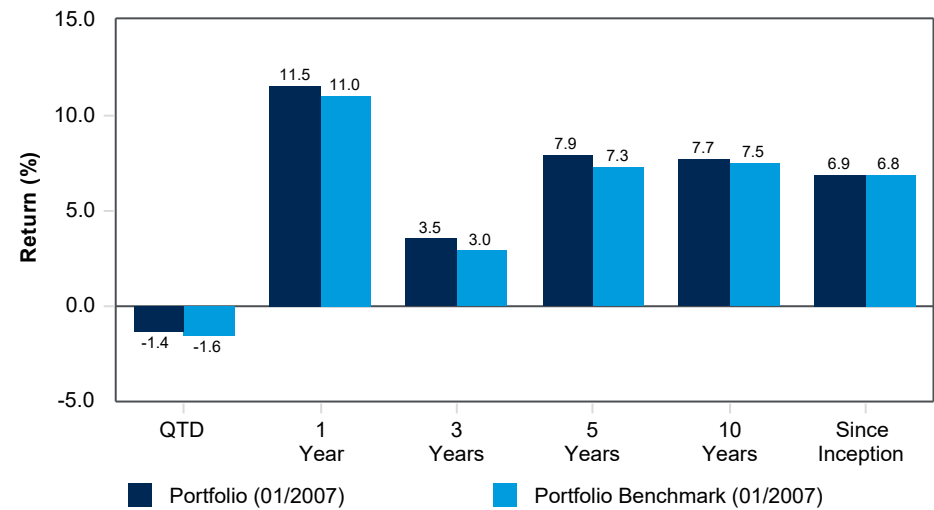


Portfolio Dashboard

Amity Pension

As of December 31, 2024

Historical Performance



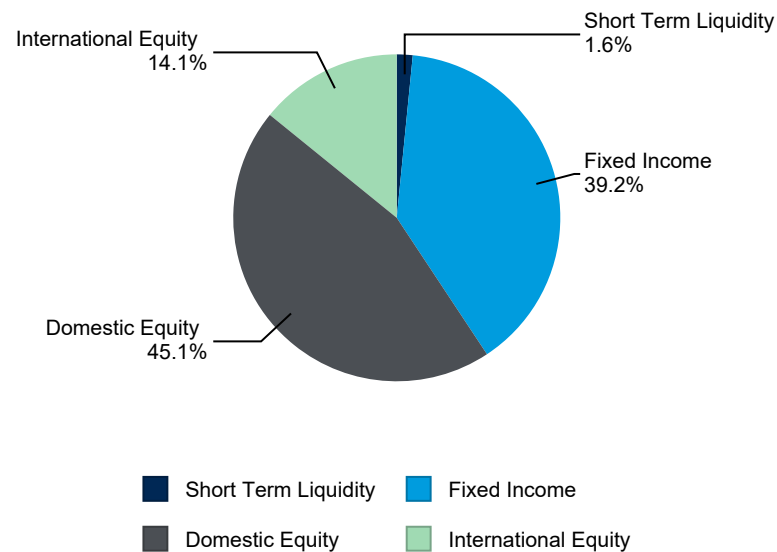
Summary of Cash Flows

	QTD	1 Year	Since Inception
Beginning Market Value	18,748,880	16,913,001	5,911,809
Net Contributions	-367,083	-720,652	-1,127,336
Gain/Loss	-258,439	1,931,009	13,338,885
Ending Market Value	18,123,359	18,123,359	18,123,359

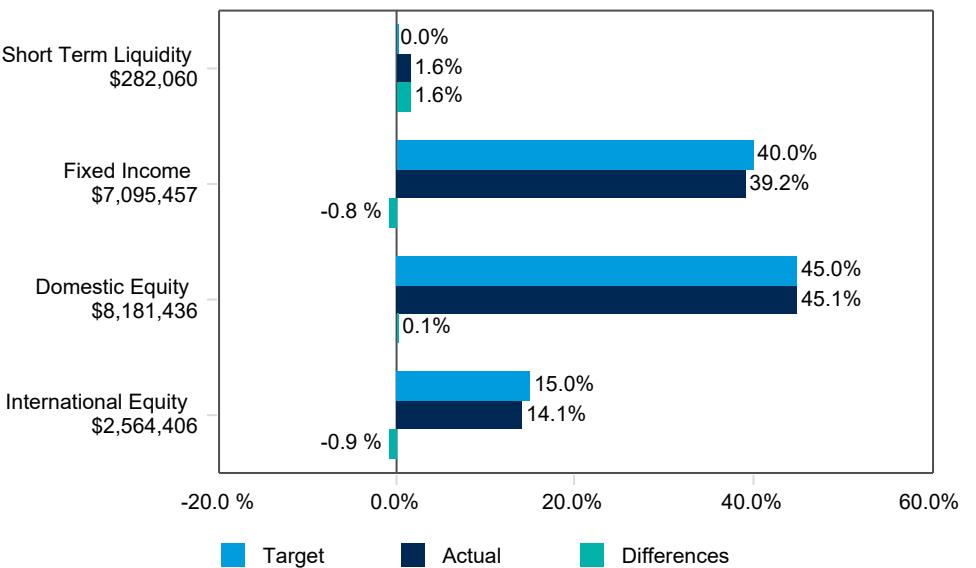
Current Benchmark Composition

From Date	To Date	
04/2024	Present	40.00% Blmbg. U.S. Aggregate, 7.50% S&P 500, 11.25% CRSP U.S. Large Cap Value TR Index, 11.25% CRSP U.S. Large Cap Growth TR Index, 9.00% CRSP U.S. Mid Cap TR Index, 6.00% CRSP U.S. Small Cap TR Index, 15.00% FTSE Developed ex US Spliced Index

Portfolio Allocation



Actual vs. Target Allocations



Client portfolio performance is presented net of underlying investment manager fees but gross of Fiducient Advisors' fees.



Asset Allocation

Amity Pension

As of December 31, 2024

	Asset Allocation (\$)	Asset Allocation (%)	Target Allocation (%)	Differences (%)
Amity Pension	18,123,359	100.0	100.0	0.0
Short Term Liquidity	282,060	1.6	0.0	1.6
All Spring Govt Money Market Fund I	282,060	1.6	0.0	1.6
Fixed Income	7,095,457	39.2	40.0	-0.8
Vanguard Total Bond Market Index Adm	5,620,141	31.0	32.0	-1.0
BlackRock Strategic Income Opportunities K	1,475,315	8.1	8.0	0.1
Domestic Equity	8,181,436	45.1	45.0	0.1
Vanguard 500 Index Adm	1,412,193	7.8	7.5	0.3
Vanguard Value Index Adm	2,016,350	11.1	11.3	-0.1
Vanguard Growth Index Adm	1,996,546	11.0	11.3	-0.2
Vanguard Mid-Cap Index Adm	1,651,993	9.1	9.0	0.1
Vanguard Small-Cap Index Adm	1,104,354	6.1	6.0	0.1
International Equity	2,564,406	14.1	15.0	-0.9
Vanguard Developed Markets Adm	2,564,406	14.1	15.0	-0.9

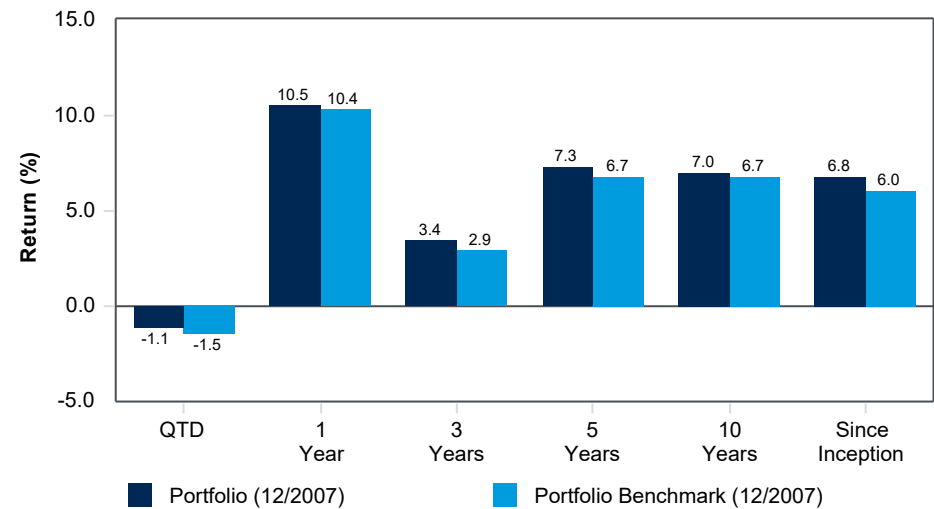


Portfolio Dashboard

Amity OPEB

As of December 31, 2024

Historical Performance



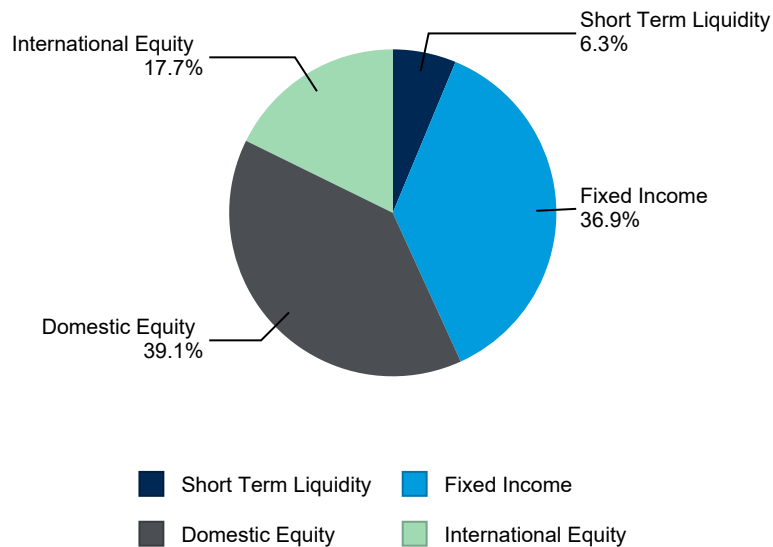
Summary of Cash Flows

	QTD	1 Year	Since Inception
Beginning Market Value	3,947,871	3,480,076	507,703
Net Contributions	1,317	77,450	1,057,172
Gain/Loss	-45,213	346,449	2,339,100
Ending Market Value	3,903,975	3,903,975	3,903,975

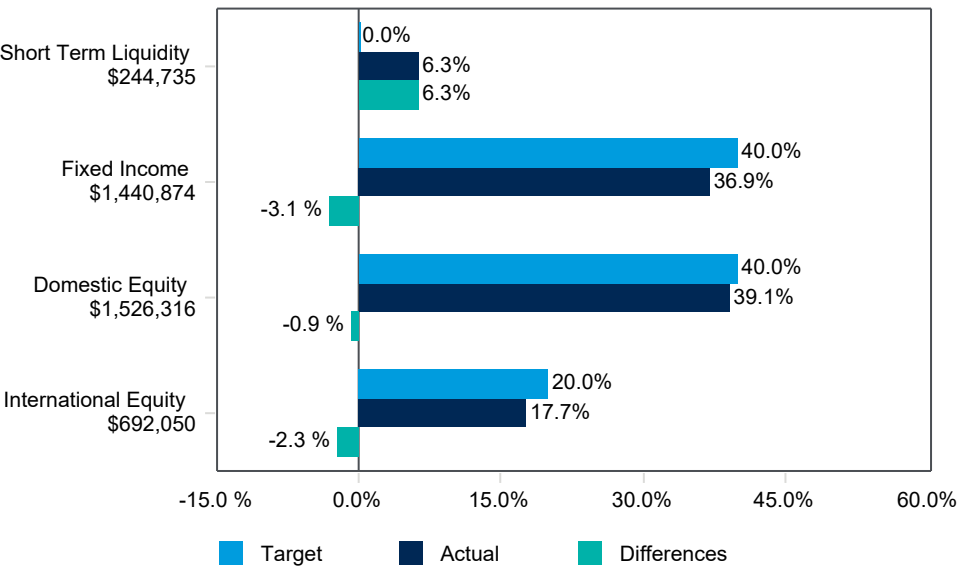
Current Benchmark Composition

From Date	To Date	
06/2023	Present	25.00% Blmbg. U.S. Aggregate, 15.00% Blmbg. U.S. TIPS 0-5 Year, 30.00% S&P 500, 10.00% CRSP U.S. Small Cap TR Index, 20.00% FTSE Developed ex US Spliced Index

Portfolio Allocation



Actual vs. Target Allocations



Client portfolio performance is presented net of underlying investment manager fees but gross of Fiducient Advisors' fees.



Asset Allocation

Amity OPEB

As of December 31, 2024

	Asset Allocation (\$)	Asset Allocation (%)	Target Allocation (%)	Differences (%)
Amity OPEB	3,903,975	100.0	100.0	0.0
Short Term Liquidity	244,735	6.3	0.0	6.3
All Spring Govt Money Market Fund I	244,735	6.3	0.0	6.3
Fixed Income	1,440,874	36.9	40.0	-3.1
Vanguard Short Term Inflation Protection Adm	551,903	14.1	15.0	-0.9
Vanguard Total Bond Market Index Adm	541,481	13.9	15.0	-1.1
BlackRock Strategic Income Opportunities K	347,490	8.9	10.0	-1.1
Domestic Equity	1,526,316	39.1	40.0	-0.9
Vanguard 500 Index Adm	1,164,794	29.8	30.0	-0.2
Vanguard Small-Cap Index Adm	361,522	9.3	10.0	-0.7
International Equity	692,050	17.7	20.0	-2.3
Vanguard Developed Markets Index Fund Adm	692,050	17.7	20.0	-2.3

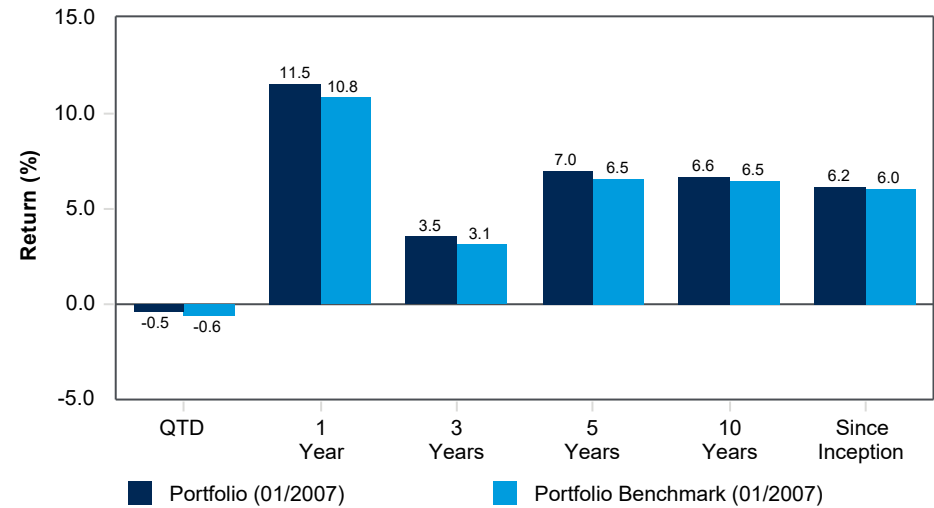


Portfolio Dashboard

Amity Sick & Severence

As of December 31, 2024

Historical Performance



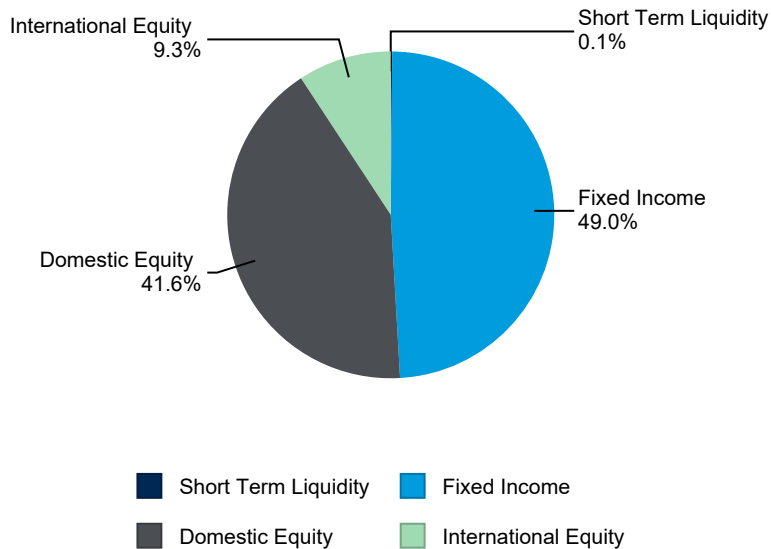
Summary of Cash Flows

	QTD	1 Year	Since Inception
Beginning Market Value	459,966	495,076	897,135
Net Contributions	-475	-88,132	-1,179,710
Gain/Loss	-2,112	50,434	739,953
Ending Market Value	457,378	457,378	457,378

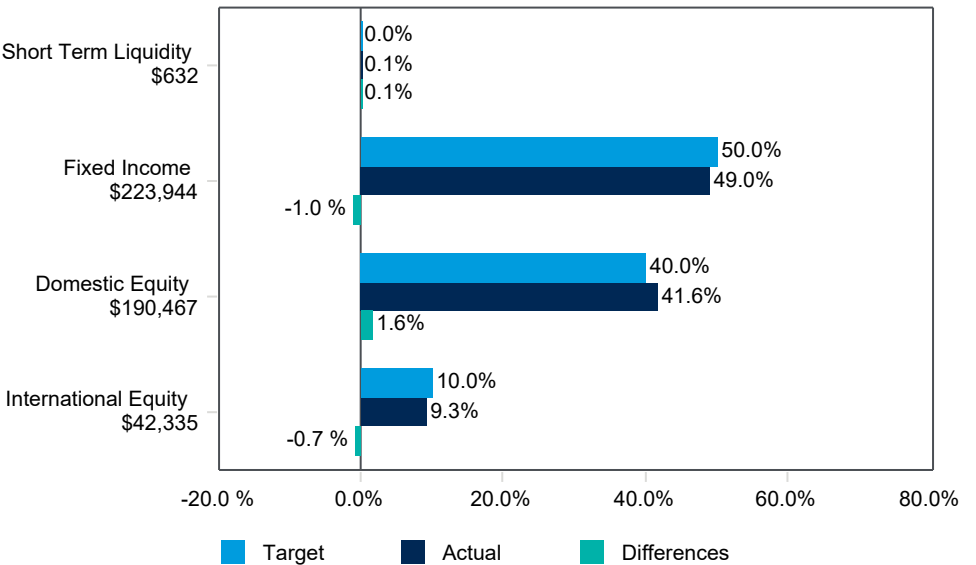
Current Benchmark Composition

From Date	To Date	
03/2014	Present	5.00% Blmbg. U.S. TIPS, 22.50% Blmbg. 1-3 Govt, 22.50% Blmbg. U.S. Aggregate, 40.00% CRSP U.S. Total Market TR Index, 10.00% FTSE Developed ex US Spliced Index

Portfolio Allocation



Actual vs. Target Allocations



Client portfolio performance is presented net of underlying investment manager fees but gross of Fiducient Advisors' fees.



Asset Allocation

Amity Sick & Severence

As of December 31, 2024

	Asset Allocation (\$)	Asset Allocation (%)	Target Allocation (%)	Differences (%)
Amity Sick & Severence	457,378	100.0	100.0	0.0
Short Term Liquidity	632	0.1	0.0	0.1
All Spring Govt Money Market Fund I	632	0.1	0.0	0.1
Fixed Income	223,944	49.0	50.0	-1.0
Vanguard Short-Term Treasury Index Fund Adm	101,274	22.1	22.5	-0.4
Vanguard Short Term Inflation Protection Adm	22,537	4.9	5.0	-0.1
Vanguard Total Bond Market Index Adm	100,133	21.9	22.5	-0.6
Domestic Equity	190,467	41.6	40.0	1.6
Vanguard Total Stock Market Index Adm	190,467	41.6	40.0	1.6
International Equity	42,335	9.3	10.0	-0.7
Vanguard Developed Markets Adm	42,335	9.3	10.0	-0.7

Appendix: Additional Plan Information & Disclosures



Fiducient Advisors Update

Retirement Plans

Featured Insights

- [The Pension Pulse Newsletter](#)
- Blog: [The State of Public Pension Plans](#)
- Wellness Webcast Series:
 - [From Worry to Wellness](#)
 - [Wellness by Fiducient in Action](#)

Endowments & Foundations

Featured Insights

- [The Steward Newsletter](#)
- [Nonprofit Investment Stewards Podcast: Reflecting on Four Years of Lessons from Nonprofit Investment Stewards](#)

The Wealth Office®

Featured Insights

- [2025 Financial Planning Guide](#)
- Blog: [Trends in Modern Philanthropy](#)
- Blog: [Year-End Money Moves: 10 Valuable Planning Opportunities to Consider](#)
- Video: [Three Critical Estate Planning Documents](#)

Research Insights

- [2025 Outlook – Bridging the Divide](#)
- [Monthly Market Recaps](#)
- [Monthly Market Updates](#)

Save the Date!

**2025
Investor Conference**

*The Westin Copley Place
Boston*

September 16 - 17

New Associates – Welcome!

Jill Anderson
RFP Specialist

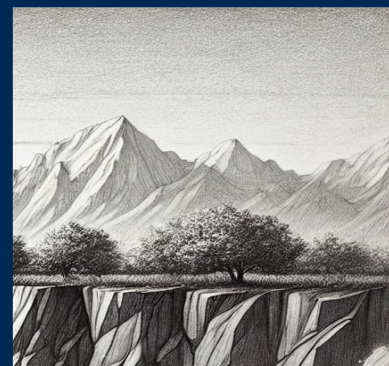
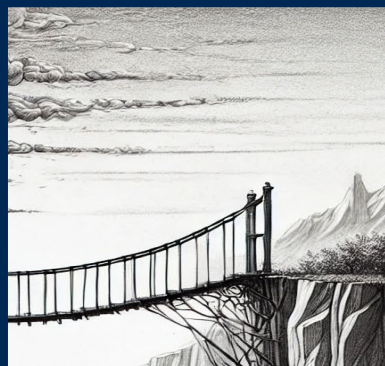
John Hart
Senior Consultant

Maya Basak
Consulting Analyst

Raymond Larson
Senior Performance Analyst

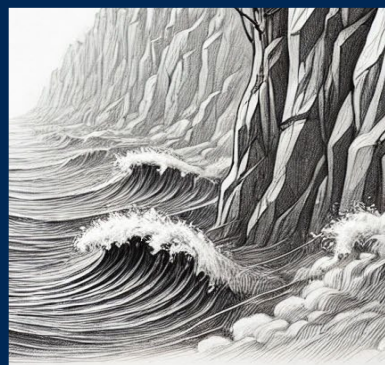
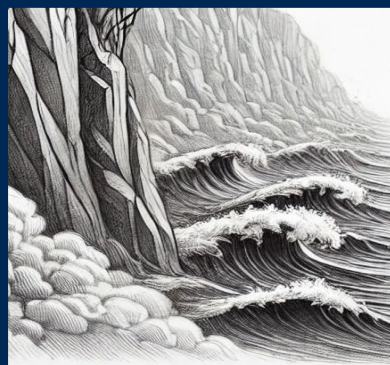
Alison Fitzgerald
Consulting Analyst

Kyle Rubovits
Consulting Analyst



Bridging The Divide

2025 Outlook



01

Fragility

Valuation, concentration and inflation have sowed the seeds for potential volatility

02

Durability

Intentionality is key and durability is available at modest “cost” in markets today

03

Age of Alpha

Active management and alternatives have the potential to enhance portfolio resilience





2025 Allocation Updates

		Y / Y Change	Context
Fixed Income	U.S. Bonds	▼	We are modestly lowering our U.S. core bond allocation. While yields still remain attractive, the potential for additional interest rate volatility and uncertainty surrounding inflation has us compelled to allocate more to Dynamic Bonds and TIPS.
	TIPS	▲	While inflation has moderated, real yields on TIPS remain positive and breakeven levels sit higher than the Fed's 2% inflation target. Recent market developments and the potential for upside inflation risk has led us to add modestly to our TIPS allocation.
	Dynamic Bonds	▲	We are increasing our allocation to dynamic fixed income. Flexibility and an expanded investment universe may prove fruitful in the face of continued interest rate volatility, and risks of reinflation and high valuations within credit.
	High Yield Bonds	--	Credit rallied in 2024 and spreads (the yield above Treasuries) sit below long-term averages, making valuations less compelling. However, all-in yields remain attractive and as a result we are maintaining our allocation to high yield bonds.
	Global Bonds	▼▼	With expected increased volatility from currency and less compelling return expectations relative to other areas of fixed income, we have removed our allocation to global bonds.
Global Equity	U.S. Large Cap	▼	Strong performance in 2024 pushed the share of U.S. equities higher in the global market. Underlying concentration has also increased alongside valuations, creating fragility. As a result we're increasing our underweight to U.S. equities through a more diverse global allocation.
	U.S. Mid/Small Cap	--	We are maintaining our overweight to U.S. small cap equities. Relative valuations favor small cap over large cap and the asset class may benefit from further easing monetary policy. Additionally, the concentration risks that have built up in the large cap segment of the market are less pronounced within small cap.
	Int'l Developed Equity	▲	U.S. equity outperformance in 2024 has driven valuations relative to non-U.S. to 20-year highs and approximately two standard deviations above average ¹ . We are modestly increasing our underweight to U.S. equity. However, uncertainties persist as to the impact of potential trade policies and geopolitical tensions around the world. As such, our underweight to U.S. remains measured overall.
	Emerging Markets	▲	
Real Assets & Alternatives	Real Estate	▼	Recent developments have contributed to a growing risk of reinflation. Our overall allocation to real assets will remain similar, however, our mix of real assets will broaden based on the variety of policy and geopolitical sources that could spark price increases. We have increased our broad real assets overall at expense of real estate. REITs have had a strong year and the relative valuation is less attractive.
	Broad Real Assets	▲	



Asset Allocation Analysis

- We believe **Asset Allocation** is the primary determinant of long-term investment results.
- Our propriety **Frontier Engineer**® system is the cornerstone of asset allocation decisions.
- Our Capital Markets Group develops **Capital Market Assumptions** (CMAs) for each major asset class at least annually.
 - The Capital Markets Group considers and analyzes a wide variety of factors that we believe will have the greatest impact on future returns and risks for each asset class studied.
 - Our CMAs are not intended to predict the future return in any single year, but rather to reflect our median expected outcome over the next ten/twenty years.
 - Our forecasting efforts center on a **ten-year horizon**. Any adjustments made to extend the forecast horizon to **twenty years** or beyond are grounded in our expectation that asset classes ultimately mean revert towards longer term historical averages.
 - Fiducient Advisors' Capital Markets Team develop our CMAs based on a “building block” approach outlined in our white paper “Capital Market Forecasts”. (Copies are available upon requested.)
- **Correlations** (how asset classes behave in reference to one another) also significantly impact asset allocation analysis.
- **Fat Tails** (non-normal return elements of skewness & kurtosis) also meaningfully impact our asset allocation analysis.



2025 Outlook and Investment Implications

- Our return expectations have decreased across all asset classes.
 - *The extremely strong investment returns across most asset classes in 2023 and 2024 have resulted in full valuations in many segments of the marketplace.*
 - *Additionally, concentration within the U.S. large-cap market and reinflation risks should be considered.*
- Rising reinflation risk and heightened probability of currency volatility may suggest an increase in more flexible fixed income strategies and a reduction or elimination of global bond allocations.
- Full valuations, significant concentration, and continued narrow market leadership in U.S. equities may make the case for a modest underweight to domestic markets, relative to the global opportunity set.
 - *The 12/31/24 allocation of the MSCI ACWI Index was approximately 65% U.S. equity, 35% international equity (~24.4% developed international, ~10.4% emerging markets).*
- Within U.S. equities, we continue to favor a modest overweight to small cap stocks given the more significant concentration within the large cap segment of the market, valuation metrics, and the potential tailwind of falling short term interest rates.
- We continue to advocate for a well-diversified “all weather” portfolio, designed to withstand various market environments.



Historical Annualized Total Return

Annualized net returns as of 12/31/2024	Fixed Income	Equity	Real Assets	Alternatives	Past 3 Months (Not Annualized)	1-Year Return	3-Year Return	5-Year Return	7-Year Return	10-Year Return	15-Year Return	20-Year Return	25-Year Return	30-Year Return	37-Year Return
Amity Pension Current Allocation (A)	40%	60%	0%	0%	-1.3%	11.2%	3.3%	7.1%	7.2%	7.3%	8.3%	7.1%	6.4%	8.1%	8.6%
Optimized Mix 1	40%	60%	0%	0%	-1.3%	11.2%	3.4%	7.1%	7.2%	7.3%	8.2%	7.1%	6.4%	8.1%	8.6%
Mix 2	50%	50%	0%	0%	-1.4%	9.7%	2.7%	6.1%	6.3%	6.5%	7.4%	6.5%	6.1%	7.6%	8.2%
Mix 3	30%	70%	0%	0%	-1.1%	12.6%	4.1%	8.1%	8.1%	8.1%	9.1%	7.6%	6.7%	8.5%	9.0%
Cash	100%				1.2%	5.4%	4.1%	2.5%	2.4%	1.8%	1.2%	1.6%	1.9%	2.4%	3.0%
TIPS	100%				-2.9%	1.8%	-2.3%	1.9%	2.3%	2.2%	2.9%	3.3%	4.8%	5.0%	5.7%
US Bond	100%				-3.1%	1.3%	-2.4%	-0.3%	1.0%	1.3%	2.4%	3.0%	3.9%	4.6%	5.3%
US Bonds - Dynamic	100%				0.2%	5.7%	2.2%	2.5%	3.0%	3.0%	3.5%	3.9%	4.2%	4.8%	5.6%
For. Dev. Bond	100%				-3.3%	-0.9%	-4.4%	-2.4%	-0.7%	0.2%	1.1%	2.0%	3.1%	3.9%	4.5%
Global Bonds	100%				-5.1%	-1.7%	-4.5%	-2.0%	-0.6%	0.2%	1.0%	1.9%	3.1%	3.8%	4.8%
HY Bond	100%				0.2%	8.2%	2.9%	4.2%	4.7%	5.2%	6.4%	6.4%	6.5%	7.0%	7.7%
EM Bond	100%				-7.0%	-2.4%	-1.0%	-1.9%	-0.4%	0.4%	1.2%	3.5%	5.7%	7.4%	7.4%
Global Equity		100%			-0.9%	18.0%	5.9%	10.6%	9.7%	9.8%	9.8%	8.2%	6.1%	8.2%	8.4%
US Equity (AC)		100%			2.6%	23.8%	8.0%	13.9%	13.2%	12.5%	13.6%	10.2%	7.8%	10.8%	11.2%
US Equity (LC)		100%			2.4%	25.0%	8.9%	14.5%	13.8%	13.1%	13.9%	10.4%	7.7%	10.9%	11.3%
US Equity (MC)		100%			0.6%	15.3%	3.8%	9.9%	9.6%	9.6%	12.1%	9.6%	9.2%	11.2%	11.7%
US Equity (SC)		100%			0.3%	11.5%	1.2%	7.4%	6.9%	7.8%	10.3%	7.8%	7.6%	9.0%	9.8%
Non-US Equity (ACWI)		100%			-7.5%	6.1%	1.3%	4.6%	4.0%	5.3%	5.2%	5.5%	4.3%	5.6%	5.9%
Int'l Dev. Equity		100%			-8.1%	4.3%	2.2%	5.2%	4.6%	5.7%	5.7%	5.3%	4.1%	5.5%	5.7%
EM Equity		100%			-7.8%	8.1%	-1.5%	2.1%	1.8%	4.0%	3.4%	6.4%	6.0%	5.3%	9.5%
Real Estate			100%		-8.2%	4.9%	-4.3%	3.3%	5.5%	5.8%	9.4%	7.1%	9.9%	9.6%	9.8%
Broad Real Assets			100%		-4.8%	3.6%	0.2%	3.3%	3.8%	3.7%	5.1%	5.7%	8.2%	7.6%	6.5%
Marketable Alternatives				100%	2.6%	7.6%	2.6%	4.9%	4.1%	3.6%	3.5%	3.3%	3.7%	5.1%	6.9%
Private Equity				100%	0.0%	0.0%	-4.4%	10.1%	11.3%	11.1%	12.7%	11.8%	9.4%	14.6%	14.2%

Historical Returns for each Mix based on back-tested return calculations developed with the benefit of hindsight. Return calculations use an asset-weighted methodology based on the target asset allocation of each mix and the total return of index proxies used to represent each asset class and are net of fees. Historical returns used are hypothetical and do not represent returns earned by a client. It is not possible to invest in an index. Please see the Frontier Engineer Hypothetical Performance Disclosures at the end of the presentation for additional information, including index proxies used to represent each asset class. For additional information on forecast methodologies, please ask for a copy of Fiducient Advisors' white paper titled 10-Year Capital Market Forecasts. Past performance does not indicate future performance and it is not possible to lose money when investing.



Calendar Year Total Return

Calendar Net Year Returns	Fixed Income	Equity	Real Assets	Alternatives	YTD 12/31/2024	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007	2006	2005	2004	2003	2002	2001	2000	1999	1998	1997	1996	1995	1994	1993	1992	1991	1990	1989
Amity Pension Current Allocation (A)	40%	60%	0%	0%	11%	16%	-15%	13%	13%	21%	-4%	14%	8%	0%	7%	18%	12%	2%	13%	22%	-24%	7%	13%	6%	11%	23%	-8%	-4%	0%	13%	16%	18%	13%	25%	1%	15%	6%	25%	-3%	21%
Optimized Mix 1	40%	60%	0%	0%	11%	16%	-14%	13%	13%	21%	-4%	14%	8%	0%	7%	18%	12%	2%	13%	22%	-24%	7%	13%	6%	11%	23%	-8%	-4%	0%	13%	16%	18%	12%	25%	1%	15%	6%	25%	-4%	21%
Mix 2	50%	50%	0%	0%	10%	14%	-14%	10%	12%	19%	-4%	13%	7%	0%	7%	14%	11%	3%	12%	20%	-20%	7%	12%	6%	10%	20%	-6%	-2%	1%	11%	15%	17%	11%	24%	0%	14%	7%	23%	-2%	20%
Mix 3	30%	70%	0%	0%	13%	18%	-15%	15%	14%	23%	-5%	16%	9%	0%	7%	21%	14%	1%	14%	24%	-28%	7%	15%	7%	13%	26%	-11%	-6%	-2%	16%	17%	19%	14%	26%	1%	16%	6%	26%	-5%	22%
Cash	100%				5%	5%	2%	0%	1%	2%	2%	1%	0%	0%	0%	0%	0%	0%	0%	0%	2%	5%	5%	3%	1%	1%	2%	4%	6%	5%	5%	5%	5%	6%	4%	3%	4%	6%	8%	9%
TIPS	100%				2%	4%	-12%	6%	11%	8%	-1%	3%	5%	-1%	4%	-9%	7%	14%	6%	11%	-2%	12%	0%	3%	8%	8%	17%	8%	13%	2%	4%	3%	4%	18%	-3%	10%	7%	16%	9%	15%
US Bond	100%				1%	6%	-13%	-2%	8%	9%	0%	4%	3%	1%	6%	-2%	4%	8%	7%	6%	5%	7%	4%	2%	4%	4%	10%	8%	12%	-1%	9%	10%	4%	18%	-3%	10%	7%	16%	9%	15%
US Bonds - Dynamic	100%				6%	9%	-7%	1%	5%	8%	1%	4%	7%	-1%	3%	2%	7%	4%	7%	19%	-7%	4%	7%	3%	6%	10%	3%	6%	3%	3%	6%	9%	8%	14%	0%	10%	9%	21%	1%	15%
For. Dev. Bond	100%				-1%	7%	-18%	-6%	8%	7%	1%	6%	3%	-2%	4%	-2%	4%	5%	4%	3%	9%	8%	5%	-2%	9%	10%	14%	1%	4%	-1%	15%	3%	8%	19%	1%	14%	6%	14%	9%	0%
Global Bonds	100%				-2%	6%	-16%	-5%	9%	7%	-1%	7%	2%	-3%	1%	-3%	4%	6%	6%	7%	5%	9%	7%	-4%	9%	13%	17%	2%	3%	-5%	14%	4%	5%	20%	0%	11%	6%	16%	11%	15%
HY Bond	100%				8%	13%	-11%	5%	7%	14%	-2%	8%	17%	-4%	2%	7%	16%	5%	15%	58%	-26%	2%	12%	3%	11%	29%	-1%	5%	-6%	2%	2%	13%	11%	19%	-1%	17%	16%	46%	-10%	1%
EM Bond	100%				-2%	13%	-12%	-9%	3%	13%	6%	15%	10%	-15%	-6%	-9%	17%	-2%	16%	22%	-5%	18%	15%	6%	23%	17%	14%	10%	13%	20%	-8%	11%	38%	27%	-19%	17%	16%	46%	-10%	1%
Global Equity		100%			18%	23%	-18%	19%	17%	27%	-9%	25%	8%	-2%	5%	23%	17%	-7%	13%	35%	-42%	12%	22%	11%	16%	35%	-19%	-16%	-14%	27%	22%	15%	13%	19%	5%	25%	-4%	20%	-16%	18%
US Equity (AC)		100%			24%	26%	-19%	26%	21%	31%	-5%	21%	13%	0%	13%	34%	16%	1%	17%	28%	-37%	5%	16%	6%	12%	31%	-22%	-11%	-7%	21%	24%	32%	22%	37%	0%	11%	10%	34%	-5%	29%
US Equity (LC)		100%			25%	26%	-18%	29%	18%	31%	-4%	22%	12%	1%	14%	32%	16%	2%	15%	26%	-37%	5%	16%	5%	11%	29%	-22%	-12%	-9%	21%	29%	33%	23%	38%	1%	10%	8%	30%	-3%	32%
US Equity (MC)		100%			15%	17%	-17%	23%	17%	31%	-9%	19%	14%	-2%	13%	35%	17%	-2%	25%	40%	-41%	6%	15%	13%	20%	40%	-18%	-6%	8%	18%	10%	29%	19%	34%	-2%	14%	16%	42%	-11%	26%
US Equity (SC)		100%			12%	17%	-20%	15%	20%	26%	-11%	15%	21%	-4%	5%	39%	16%	-4%	27%	27%	-34%	-2%	18%	5%	18%	47%	-20%	2%	-3%	21%	-3%	22%	16%	28%	-2%	19%	18%	46%	-19%	16%
Non-US Equity (ACWI)		100%			6%	16%	-16%	8%	11%	22%	-14%	28%	5%	-5%	-3%	16%	17%	-13%	12%	42%	-45%	17%	27%	17%	21%	41%	-15%	-19%	-15%	31%	14%	2%	7%	10%	7%	35%	-11%	14%	-23%	12%
Int'l Dev. Equity		100%			4%	19%	-14%	12%	8%	23%	-13%	26%	2%	0%	-4%	23%	18%	-12%	8%	32%	-43%	12%	27%	14%	21%	39%	-16%	-21%	-14%	27%	20%	2%	6%	12%	8%	33%	-12%	12%	-23%	11%
EM Equity		100%			8%	10%	-20%	-2%	19%	19%	-14%	38%	12%	-15%	-2%	-2%	19%	-18%	19%	79%	-53%	40%	33%	35%	26%	56%	-6%	-2%	-31%	66%	-25%	-12%	6%	-5%	-7%	75%	11%	60%	-11%	65%
Real Estate			100%		5%	11%	-25%	41%	-5%	29%	-4%	9%	9%	3%	28%	3%	20%	8%	28%	28%	-38%	-16%	35%	12%	32%	37%	4%	14%	26%	-5%	-18%	20%	35%	15%	3%	20%	15%	36%	-15%	9%
Broad Real Assets			100%		4%	8%	-10%	15%	1%	17%	-6%	11%	11%	-10%	5%	4%	14%	3%	15%	33%	-28%	11%	23%	10%	20%	26%	25%	-3%	28%	10%	-14%	2%	14%	14%	4%	4%	4%	4%	-6%	2%
Marketable Alternatives				100%	8%	6%	-5%	6%	11%	8%	-4%	8%	1%	0%	3%	9%	5%	-6%	6%	11%	-21%	10%	10%	7%	7%	12%	1%	3%	4%	26%	-5%	16%	14%	11%	-3%	26%	12%	14%	18%	23%
Private Equity				100%	0%	0%	-12%	40%	32%	16%	13%	16%	9%	8%	15%	23%	12%	12%	18%	10%	-20%	18%	25%	21%	22%	14%	-16%	-21%	10%	125%	21%	32%	33%	32%	14%	23%	14%	14%	4%	9%

Historical Returns for each Mix based on back-tested return calculations developed with the benefit of hindsight. Return calculations use an asset-weighted methodology based on the target asset allocation of each mix and the total return of index proxies used to represent each asset class and are net of fees. Historical returns used are hypothetical and do not represent returns earned by a client. It is not possible to invest in an index. Please see the Frontier Engineer Hypothetical Performance Disclosures at the end of the presentation for additional information, including index proxies used to represent each asset class. For additional information on forecast methodologies, please ask for a copy of Fiducient Advisors' white paper titled 10-Year Capital Market Forecasts. Past performance does not indicate future performance and is not possible to lose money when investing.



Capital Market Assumptions

Return & Risk Assumptions (Forecasts)	Arithmetic Return	Geometric Return	Standard Deviation	Skewness	Kurtosis
Cash	3.1%	3.1%	0.0%	0	0
US Bond	5.4%	5.2%	7.3%	-0.33	1.69
US Bonds - Dynamic	5.5%	5.3%	6.4%	-0.88	6.04
US Equity (LC)	8.0%	6.6%	16.6%	-0.57	0.82
US Equity (MC)	8.3%	6.7%	18.2%	-0.66	2.01
US Equity (SC)	8.6%	6.4%	21.1%	-0.42	1.04
Int'l Dev. Equity	10.7%	8.4%	21.5%	-0.52	1.26

Correlation Assumptions (Forecasts)	Cash	US Bond	US Bonds - Dynamic	US Equity (LC)	US Equity (MC)	US Equity (SC)	Int'l Dev. Equity
Cash	1	0	0	0	0	0	0
US Bond	0	1.00	0.59	0.24	0.24	0.15	0.21
US Bonds - Dynamic	0	0.59	1.00	0.61	0.66	0.59	0.57
US Equity (LC)	0	0.24	0.61	1.00	0.94	0.84	0.70
US Equity (MC)	0	0.24	0.66	0.94	1.00	0.94	0.69
US Equity (SC)	0	0.15	0.59	0.84	0.94	1.00	0.63
Int'l Dev. Equity	0	0.21	0.57	0.70	0.69	0.63	1.00

October 31, 2024 Twenty-Year Forecasted CMA's

*Historical mix return calculations assume a weighted average excess return assumption of 0.5% with a Fiducient Advisors

For additional information on forecast methodologies, please speak with your advisor. Please see the Index Proxy Summary slide at the end of this presentation for summary of indexes used to represent each asset class. Past performance does not indicate future performance. Please see the Frontier Engineer Hypothetical Performance Disclosures at the end of the presentation for additional information.



Indices for Past Return & Risk Metrics

Indices used to generate historical risk and return metrics	Most Recent Index	Index Dates			Linked Index 1	Index Dates			Linked Index 2	Index Dates			Linked Index 2	Index Dates		
Cash	FTSE Treasury Bill 3 Mon USD	12/24	-	1/79	N.A.	N.A.	-	N.A.	N.A.	N.A.	-	N.A.	N.A.	N.A.	-	N.A.
US Bond	Bloomberg US Agg Bond TR USD	12/24	-	1/79	N.A.	N.A.	-	N.A.	N.A.	N.A.	-	N.A.	N.A.	N.A.	-	N.A.
US Bonds - Dynamic	*Custom Blend of Indices	12/24	-	2/90	Bloomberg US Agg Bond TR USD	1/90	-	1/79	N.A.	N.A.	-	N.A.	N.A.	N.A.	-	N.A.
US Equity (LC)	S&P 500 TR USD	12/24	-	1/79	N.A.	N.A.	-	N.A.	N.A.	N.A.	-	N.A.	N.A.	N.A.	-	N.A.
US Equity (MC)	Russell Mid Cap TR USD	12/24	-	1/79	N.A.	N.A.	-	N.A.	N.A.	N.A.	-	N.A.	N.A.	N.A.	-	N.A.
US Equity (SC)	Russell 2000 TR USD	12/24	-	1/79	N.A.	N.A.	-	N.A.	N.A.	N.A.	-	N.A.	N.A.	N.A.	-	N.A.
Int'l Dev. Equity	MSCI EAFE GR USD	12/24	-	1/79	N.A.	N.A.	-	N.A.	N.A.	N.A.	-	N.A.	N.A.	N.A.	-	N.A.

*US Bonds - Dynamic Index - 1/3 Bloomberg Gbl Agg Ex USD TR Hdg USD, 1/3 FTSE Treasury Bill 3 Mon USD & 1/3 Bloomberg US Corporate High Yield TR USD
 e of 0.25%.

Note: Private Equity Index is frequently 3-6 months behind the other indices. For historical return calculation purposes, it is given 0% returns during the most recent period where gaps may exist. Past performance, actual or hypothetical, is no guarantee of future results and there is a possibility of a loss. Please see Frontier Engineer Hypothetical Performance Disclosures at the end of the presentation for additional information, including index proxies used to represent each asset class.



Frontier Engineer® Hypothetical Performance Disclosures

The historical performance information derived from the Frontier Engineer and used or presented in charts, tables, or graphs represent simulated historical performance, which has been derived by retroactively applying an asset allocation modeling process in its most recently developed form with its most recently derived ten-year (forward-looking) capital market assumptions. Such historical return simulations (or back testing) was performed by simulating the combination of actual index returns for the historical period with a buy and hold strategy effective January 1, 1988 through the most recently available month-end date with simulated rebalancing occurring every month-end (with the reinvestment of dividends and capital gains from each index).

Back tested performance is hypothetical and does not reflect actual trades or actual client performance. As with all models, there are inherent limitations which are derived from the retroactive application developed with the benefit of hindsight, including the risk that certain factors such as material economic and market conditions could have contributed to materially different (either higher or lower) performance results than those depicted, or that certain material factors may have been included or excluded from consideration. As such, actual results during the applicable back tested period would have been different than those depicted.

The asset allocation modeling process currently used was initially developed in 2002, and was not offered as a strategy prior to that time. The output of a forward-looking model (or process) is a representation of allocation percentages among specific asset classes. Clients cannot invest directly in a target allocation, but rather, in underlying securities within designated asset classes. Advisor may change its models from time to time, and regularly updates its model as additional capital market assumption information becomes available or to increase or decrease relative weightings or emphasis on certain factors. Consequently, the Advisor may choose to deviate from a stated model over time as the model itself is revised, which could have a materially positive or negative impact on performance.

During the period represented, numerous modelling changes were made, including the regular changes in (ten-year) forward-looking expected returns, expected volatilities, expected non-normal return distribution assumptions, as well as tracking-error assumptions and risk budgets. Furthermore, such assumptions can be modified client-by-client depending on certain preferences, priorities, constraints or unique considerations applicable to each client.

Other economic and market factors may have impacted decision-making when using the model to manage client funds, including the list of approved asset classes by a client or client type as well as any client-directed or Advisor implemented constraints.

All investments bear the risk of loss, including the loss of principal. Past performance, actual or hypothetical, is no guarantee of future results.

The hypothetical annual Fiducient Advisors' fee is divided by 12 and subtracted from the historical monthly (index) returns. The hypothetical excess return assumption is divided by 12 and added to the historical monthly (index) returns. Furthermore, for forecasted total portfolio (index-based) annual returns based on capital market assumptions, the annual Fiducient Advisors' fee assumption is subtracted from the hypothetical annual manager excess return assumption. Additional information on advisory fees charged by Fiducient Advisors are described in Part 2 of the Form ADV.



Index Definitions

INDEX DEFINITIONS

FTSE Treasury Bill 3 Month measures return equivalents of yield averages and are not marked to market. It is an average of the last three three-month Treasury bill month-end rates.

Bloomberg Capital US Treasury Inflation Protected Securities Index consists of Inflation-Protection securities issued by the U.S. Treasury.

Bloomberg Muni 5 Year Index is the 5 year (4-6) component of the Municipal Bond index.

Bloomberg High Yield Municipal Bond Index covers the universe of fixed rate, non-investment grade debt.

Bloomberg U.S. Aggregate Index covers the U.S. investment grade fixed rate bond market, with index components for government and corporate securities, mortgage pass-through securities, and asset-backed securities.

FTSE World Government Bond Index (WGBI) (Unhedged) provides a broad benchmark for the global sovereign fixed income market by measuring the performance of fixed-rate, local currency, investment-grade sovereign debt from over 20 countries,

FTSE World Government Bond Index (WGBI) (Hedged) is designed to represent the FTSE WGBI without the impact of local currency exchange rate fluctuations.

Bloomberg US Corporate High Yield TR USD covers the universe of fixed rate, non-investment grade debt. Eurobonds and debt issues from countries designated as emerging markets (sovereign rating of Baa1/BBB+/BBB+ and below using the middle of Moody's, S&P, and Fitch) are excluded, but Canadian and global bonds (SEC registered) of issuers in non-EMG countries are included.

JP Morgan Government Bond Index-Emerging Market Index (GBI-EMI) is a comprehensive, global local emerging markets index, and consists of regularly traded, liquid fixed-rate, domestic currency government bonds to which international investors can gain exposure.

JPMorgan EMBI Global Diversified is an unmanaged, market-capitalization weighted, total-return index tracking the traded market for U.S.-dollar-denominated Brady bonds, Eurobonds, traded loans, and local market debt instruments issued by sovereign and quasi-sovereign entities.

MSCI ACWI is designed to represent performance of the full opportunity set of large- and mid-cap stocks across multiple developed and emerging markets, including cross-market tax incentives.

The S&P 500 is a capitalization-weighted index designed to measure performance of the broad domestic economy through changes in the aggregate market value of 500 stocks representing all major industries.

Russell 3000 is a market-cap-weighted index which consists of roughly 3,000 of the largest companies in the U.S. as determined by market capitalization. It represents nearly 98% of the investable U.S. equity market.

Russell Mid Cap measures the performance of the 800 smallest companies in the Russell 1000 Index.

Russell 2000 consists of the 2,000 smallest U.S. companies in the Russell 3000 index.

MSCI EAFE is an equity index which captures large and mid-cap representation across Developed Markets countries around the world, excluding the US and Canada. The index covers approximately 85% of the free float-adjusted market capitalization in each country.

MSCI Emerging Markets captures large and mid-cap representation across Emerging Markets countries. The index covers approximately 85% of the free-float adjusted market capitalization in each country

The Wilshire US Real Estate Securities Index (Wilshire US RESI) is comprised of publicly-traded real estate equity securities and designed to offer a market-based index that is more reflective of real estate held by pension funds.

Alerian MLP Index is a float adjusted, capitalization-weighted index, whose constituents represent approximately 85% of total float-adjusted market capitalization, is disseminated real-time on a price-return basis (AMZ) and on a total-return basis.

Bloomberg Commodity Index (BCI) is calculated on an excess return basis and reflects commodity futures price movements. The index rebalances annually weighted 2/3 by trading volume and 1/3 by world production and weight-caps are applied at the commodity, sector and group level for diversification.

Treasury Inflation-Protected Securities (TIPS) are Treasury bonds that are indexed to inflation to protect investors from the negative effects of rising prices. The principal value of TIPS rises as inflation rises.

HFRI Fund of Funds Composite is an equal-weighted index consisting of over 800 constituent hedge funds, including both domestic and offshore funds.

Cambridge Associates U.S. Private Equity Index (67% Buyout vs. 33% Venture) is based on data compiled from more than 1,200 institutional-quality buyout, growth equity, private equity energy, and mezzanine funds formed between 1986 and 2015.

HFN Hedge Fund Aggregate Average is an equal weighted average of all hedge funds and CTA/managed futures products reporting to the HFN Database. Constituents are aggregated from each of the HFN Strategy Specific Indices.

Goldman Sachs Commodity Index (GSCI) is a broadly diversified, unleveraged, long-only composite index of commodities that measures the performance of the commodity market.

Definitions & Disclosures

Please note: Due to rounding methodologies of various data providers, certain returns in this report might differ slightly when compared to other sources

REGULATORY DISCLOSURES

Offer of ADV Part 2A: Rule 204-3 under the Investment Advisers Act of 1940 requires that we make an annual offer to clients to send them, without charge, a written disclosure statement meeting the requirements of such rule. We will be glad to send a copy of our ADV Part 2A to you upon your written request to compliance@fiducient.com.

INDEX DEFINITIONS

- **Citigroup 3 Month T-Bill** measures monthly return equivalents of yield averages that are not marked to market. The Three-Month Treasury Bill Indexes consist of the last three three-month Treasury bill issues.
- **Ryan 3 Yr. GIC** is an arithmetic mean of market rates of \$1 million Guaranteed Interest Contracts held for three years.
- **Bloomberg Treasury U.S. T-Bills-1-3 Month Index** includes aged U.S. Treasury bills, notes and bonds with a remaining maturity from 1 up to (but not including) 3 months. It excludes zero coupon strips.
- **Bloomberg Capital US Treasury Inflation Protected Securities Index** consists of Inflation-Protection securities issued by the U.S. Treasury.
- **Bloomberg Muni Index** is a rules-based, market-value-weighted index engineered for the long-term tax-exempt bond market. Bonds must be rated investment-grade by at least two ratings agencies.
- **Bloomberg Muni 1 Year Index** is the 1-year (1-2) component of the Municipal Bond index.
- **Bloomberg Muni 3 Year Index** is the 3-year (2-4) component of the Municipal Bond index.
- **Bloomberg Muni 5 Year Index** is the 5-year (4-6) component of the Municipal Bond index.
- **Bloomberg Muni 7 Year Index** is the 7-year (6-8) component of the Municipal Bond index.
- **Bloomberg Intermediate U.S. Gov't/Credit** is the Intermediate component of the U.S. Government/Credit index, which includes securities in the Government and Credit Indices. The Government Index includes treasuries and agencies, while the credit index includes publicly issued U.S. corporate and foreign debentures and secured notes that meet specified maturity, liquidity, and quality requirements.
- **Bloomberg U.S. Aggregate Index** covers the U.S. investment grade fixed rate bond market, with index components for government and corporate securities, mortgage pass-through securities, and asset-backed securities.
- **Bloomberg Global Aggregate ex. USD Indices** represent a broad-based measure of the global investment-grade fixed income markets. The two major components of this index are the Pan-European Aggregate and the Asian-Pacific Aggregate Indices. The index also includes Eurodollar and Euro-Yen corporate bonds and Canadian government, agency and corporate securities.
- **Bloomberg U.S. Corporate High Yield Index** covers the universe of fixed rate, non-investment grade debt. Eurobonds and debt issues from countries designated as emerging markets (sovereign rating of Baa1/BBB+/BBB+ and below using the middle of Moody's, S&P, and Fitch) are excluded, but Canadian and global bonds (SEC registered) of issuers in non-EMG countries are included.
- **JP Morgan Government Bond Index-Emerging Market (GBI-EM) Index** is a comprehensive, global local emerging markets index, and consists of regularly traded, liquid fixed-rate, domestic currency government bonds to which international investors can gain exposure.
- **The S&P 500** is a capitalization-weighted index of 500 stocks designed to measure performance of the broad domestic economy through changes in the aggregate market value of 500 stocks representing all major industries.
- **The Dow Jones Industrial Index** is a price-weighted average of 30 blue-chip stocks that are generally the leaders in their industry.
- **The NASDAQ** is a broad-based capitalization-weighted index of stocks in all three NASDAQ tiers: Global Select, Global Market and Capital Market.
- **Russell 3000** is a market-cap-weighted index which consists of roughly 3,000 of the largest companies in the U.S. as determined by market capitalization. It represents nearly 98% of the investable U.S. equity market.
- **Russell 1000** consists of the largest 1000 companies in the Russell 3000 Index.
- **Russell 1000 Growth** measures the performance of those Russell 1000 companies with higher P/B ratios and higher forecasted growth values.
- **Russell 1000 Value** measures the performance of those Russell 1000 companies with lower P/B ratios and lower forecasted growth values.
- **Russell Mid Cap** measures the performance of the 800 smallest companies in the Russell 1000 Index.
- **Russell Mid Cap Growth** measures the performance of those Russell Mid Cap companies with higher P/B ratios and higher forecasted growth values.
- **Russell Mid Cap Value** measures the performance of those Russell Mid Cap companies with lower P/B ratios and lower forecasted growth values.
- **Russell 2000** consists of the 2,000 smallest U.S. companies in the Russell 3000 index.
- **Russell 2000 Growth** measures the performance of the Russell 2000 companies with higher P/B ratios and higher forecasted growth values.
- **Russell 2000 Value** measures the performance of those Russell 2000 companies with lower P/B ratios and lower forecasted growth values.
- **Russell 2500** consists of the 2,500 smallest U.S. companies in the Russell 3000 index.
- **Russell 2500 Growth** measures the performance of the Russell 2500 companies with higher P/B ratios and higher forecasted growth values.
- **Russell 2500 Value** measures the performance of those Russell 2500 companies with lower P/B ratios and lower forecasted growth values.
- **MSCI World** captures large and mid-cap representation across 23 Developed Markets countries. With 1,645 constituents, the index covers approximately 85% of the free float-adjusted market capitalization in each country.
- **MSCI ACWI (All Country World Index) ex. U.S. Index** captures large and mid-cap representation across 22 of 23 Developed Markets countries (excluding the United States) and 23 Emerging Markets countries. With 1,859 constituents, the index covers approximately 85% of the global equity opportunity set outside the US.
- **MSCI ACWI (All Country World Index) ex. U.S. Small Cap Index** captures small cap representation across 22 of 23 Developed Markets countries (excluding the US) and 23 Emerging Markets countries. With 4,368 constituents, the index covers approximately 14% of the global equity opportunity set outside the US.
- **MSCI EAFE** is an equity index which captures large and mid-cap representation across Developed Markets countries around the world, excluding the US and Canada. With 930 constituents, the index covers approximately 85% of the free float-adjusted market capitalization in each country.

- **MSCI EAFE Value** captures large and mid-cap securities exhibiting overall value style characteristics across Developed Markets countries around the world, excluding the US and Canada. The value investment style characteristics for index construction are defined using three variables: book value to price, 12-month forward earnings to price and dividend yield. With 507 constituents, the index targets 50% coverage of the free float-adjusted market capitalization of the MSCI EAFE Index.
- **MSCI EAFE Growth** captures large and mid-cap securities exhibiting overall growth style characteristics across Developed Markets countries around the world, excluding the US and Canada. The growth investment style characteristics for index construction are defined using five variables: long-term forward EPS growth rate, short-term forward EPS growth rate, current internal growth rate and long-term historical EPS growth trend and long-term historical sales per share growth trend. With 542 constituents, the index targets 50% coverage of the free float-adjusted market capitalization of the MSCI EAFE Index.
- **MSCI Emerging Markets** captures large and mid-cap representation across 23 Emerging Markets countries. With 836 constituents, the index covers approximately 85% of the free-float adjusted market capitalization in each country.
- **Consumer Price Index** is a measure of prices paid by consumers for a market basket of consumer goods and services. The yearly (or monthly) growth rates represent the inflation rate.
- **FTSE NAREIT Equity REITs Index** contains all Equity REITs not designed as Timber REITs or Infrastructure REITs.
- **S&P Developed World Property** defines and measures the investable universe of publicly traded property companies domiciled in developed markets. The companies in the index are engaged in real estate related activities, such as property ownership, management, development, rental and investment.
- **S&P Developed World Property x U.S.** defines and measures the investable universe of publicly traded property companies domiciled in developed countries outside of the U.S. The companies included are engaged in real estate related activities, such as property ownership, management, development, rental and investment.
- **Fund Specific Broad Real Asset Benchmarks:**
 - **DWS Real Assets:** 30%: Dow Jones Brookfield Infrastructure Index, 30%: FTSE EPRA/NAREIT Developed Index, 15%: Bloomberg Commodity Index, 15%: S&P Global Natural Resources Index, 10%: U.S. Treasury Inflation Notes Total Return Index
 - **PIMCO Inflation Response Multi Asset Fund:** 45% Bloomberg U.S. TIPS, 20% Bloomberg Commodity Index, 15% JP Morgan Emerging Local Markets Plus, 10% Dow Jones Select REIT, 10% Bloomberg Gold Subindex Total Return
 - **Principal Diversified Real Assets:** 35% BbgBarc U.S. Treasury TIPS Index, 20% S&P Global Infrastructure Index NTR, 20% S&P Global Natural Resources Index NTR, 15% Bloomberg Commodity Index, and 10% FTSE EPRA/NAREIT Developed Index NTR
 - **Wellington Diversified Inflation H:** 50% MSCI ACWI Commodity Producers Index, 25% Bloomberg Commodity Index, and 25% Bloomberg Bloomberg US TIPS 1 – 10 Year Index
- **Bloomberg Commodity Index** is calculated on an excess return basis and reflects commodity futures price movements. The index rebalances annually weighted 2/3 by trading volume and 1/3 by world production and weight-caps are applied at the commodity, sector and group level for diversification.
- **HFRI Fund Weighted Composite Index** is a global, equal-weighted index of over 2,000 single-manager funds that report to HFR Database. Constituent funds report monthly net of all fees performance in US Dollar and have a minimum of \$50 Million under management or a twelve (12) month track record of active performance. The HFRI Fund Weighted Composite Index does not include Funds of Hedge Funds.
- **The Alerian MLP Index** is the leading gauge of energy Master Limited Partnerships (MLPs). The float adjusted, capitalization-weighted index, whose constituents represent approximately 85% of total float-adjusted market capitalization, is disseminated real-time on a price-return basis (AMZ) and on a total-return basis.
- **The Adjusted Alerian MLP Index** is commensurate with 65% of the monthly returns of the Alerian MLP Index to incorporate the effect of deferred tax liabilities incurred by MLP entities.
- **Cambridge Associates U.S. Private Equity Index** is based on data compiled from more than 1,200 institutional-quality buyout, growth equity, private equity energy, and mezzanine funds formed between 1986 and 2015.
- **Cambridge Associates U.S. Venture Capital Index** is based on data compiled from over 1,600 institutional-quality venture capital funds formed between 1986 and 2015.
- **Vanguard Spliced Bloomberg US1-5Yr Gov/Cr Flt Adj Index:** Bloomberg U.S. 1–5 Year Government/Credit Bond Index through December 31, 2009; Bloomberg U.S. 1–5 Year Government/Credit Float Adjusted Index thereafter.
- **Vanguard Spliced Bloomberg US5-10Yr Gov/Cr Flt Adj Index:** Bloomberg U.S. 5–10 Year Government/Credit Bond Index through December 31, 2009; Bloomberg U.S. 5–10 Year Government/Credit Float Adjusted Index thereafter.
- **Vanguard Spliced Bloomberg US Agg Flt Adj Index:** Bloomberg U.S. Aggregate Bond Index through December 31, 2009; Bloomberg U.S. Aggregate Float Adjusted Index thereafter.
- **Vanguard Spliced Bloomberg US Long Gov/Cr Flt Adj Index:** Bloomberg U.S. Long Government/Credit Bond Index through December 31, 2009; Bloomberg U.S. Long Government/Credit Float Adjusted Index thereafter.
- **Vanguard Balanced Composite Index:** Made up of two unmanaged benchmarks, weighted 60% Dow Jones U.S. Total Stock Market Index (formerly the Dow Jones Wilshire 5000 Index) and 40% Bloomberg U.S. Aggregate Bond Index through May 31, 2005; 60% MSCI US Broad Market Index and 40% Bloomberg U.S. Aggregate Bond Index through December 31, 2009; 60% MSCI US Broad Market Index and 40% Bloomberg U.S. Aggregate Float Adjusted Index through January 14, 2013; and 60% CRSP US Total Market Index and 40% Bloomberg U.S. Aggregate Float Adjusted Index thereafter.
- **Vanguard Spliced Intermediate-Term Tax-Exempt Index:** Bloomberg 1–15 Year Municipal Bond Index.
- **Vanguard Spliced Extended Market Index:** Dow Jones Wilshire 4500 Index through June 17, 2005; S&P Transitional Completion Index through September 16, 2005; S&P Completion Index thereafter.
- **Vanguard Spliced Value Index:** S&P 500 Value Index (formerly the S&P 500/Barra Value Index) through May 16, 2003; MSCI US Prime Market Value Index through April 16, 2013; CRSP US Large Cap Value Index thereafter.
- **Vanguard Spliced Large Cap Index:** Consists of MSCI US Prime Market 750 Index through January 30, 2013, and the CRSP US Large Cap Index thereafter.
- **Vanguard Spliced Growth Index:** S&P 500 Growth Index (formerly the S&P 500/Barra Growth Index) through May 16, 2003; MSCI US Prime Market Growth Index through April 16, 2013; CRSP US Large Cap Growth Index thereafter.
- **Vanguard Spliced Mid Cap Value Index:** MSCI US Mid Cap Value Index through April 16, 2013; CRSP US Mid Cap Value Index thereafter.
- **Vanguard Spliced Mid Cap Index:** S&P MidCap 400 Index through May 16, 2003; the MSCI US Mid Cap 450 Index through January 30, 2013; and the CRSP US Mid Cap Index thereafter.
- **Vanguard Spliced Mid Cap Growth Index:** MSCI US Mid Cap Growth Index through April 16, 2013; CRSP US Mid Cap Growth Index thereafter.
- **Vanguard Spliced Total Stock Market Index:** Dow Jones U.S. Total Stock Market Index (formerly known as the Dow Jones Wilshire 5000 Index) through April 22, 2005; MSCI US Broad Market Index through June 2, 2013; and CRSP US Total Market Index thereafter.
- **Vanguard Spliced Small Cap Value Index:** SmallCap 600 Value Index (formerly the S&P SmallCap 600/Barra Value Index) through May 16, 2003; MSCI US Small Cap Value Index through April 16, 2013; CRSP US Small Cap Value Index thereafter.

- **Vanguard Spliced Small Cap Index:** Russell 2000 Index through May 16, 2003; the MSCI US Small Cap 1750 Index through January 30, 2013; and the CRSP US Small Cap Index thereafter.
- **Vanguard Spliced Small Cap Growth Index:** S&P SmallCap 600 Growth Index (formerly the S&P SmallCap 600/Barra Value Index) through May 16, 2003; MSCI US Small Cap Growth Index through April 16, 2013; CRSP US Small Cap Growth Index thereafter.
- **Vanguard Spliced Total International Stock Index:** Consists of the Total International Composite Index through August 31, 2006; the MSCI EAFE + Emerging Markets Index through December 15, 2010; the MSCI ACWI ex USA IMI Index through June 2, 2013; and FTSE Global All Cap ex US Index thereafter. Benchmark returns are adjusted for withholding taxes.
- **Vanguard Spliced Developed Markets Index:** MSCI EAFE Index through May 28, 2013; FTSE Developed ex North America Index through December 20, 2015; FTSE Developed All Cap ex US Transition Index through May 31, 2016; FTSE Developed All Cap ex US Index thereafter. Benchmark returns are adjusted for withholding taxes.
- **Vanguard Spliced Emerging Markets Index:** Select Emerging Markets Index through August 23, 2006; MSCI Emerging Markets Index through January 9, 2013; FTSE Emerging Transition Index through June 27, 2013; FTSE Emerging Index through November 1, 2015; and FTSE Emerging Markets All Cap China A Transition Index thereafter. Benchmark returns are adjusted for withholding taxes.
- **Vanguard REIT Spliced Index:** MSCI US REIT Index adjusted to include a 2% cash position (Lipper Money Market Average) through April 30, 2009; MSCI US REIT Index through January 31, 2018; MSCI US Investable Market Real Estate 25/50 Transition Index through July 24, 2018; MSCI US Investable Market Real Estate 25/50 Index thereafter.

Additional:

- Equity sector returns are calculated by Russell and MSCI for domestic and international markets, respectively. MSCI sector definitions correspond to the MSCI GICS® classification (Global Industry Classification System); Russell uses its own sector and industry classifications.
- MSCI country returns are calculated by MSCI and are free float-adjusted market capitalization indices that are designed to measure equity market performance in each specific country.
- Currency returns are calculated using Bloomberg's historical spot rate indices and are calculated using the U.S. dollar as the base currency.
- The Index of Leading Economic Indicators, calculated by The Conference Board, is used as a barometer of economic activity over a range of three to six months. The index is used to determine the direction and stability of the economy. The composite index of leading indicators, which is derived from 10 leading indicators, helps to signal turning points in the economy and forecast economic cycles. The leading indicators are the following: average weekly hours, average weekly initial claims, manufacturers' new orders, both consumer and non-defense capital goods, vendor performance, building permits, stock prices, money supply (M2), the interest rate spread and the index of consumer expectations.
- S&P Target Date Indexes are constructed using a survey method of current target date investments with \$100 million or more in assets under management. Allocations for each vintage are comprised of exchange-traded funds that represent respective asset classes used in target date portfolios. The indexes are designed to represent a market consensus glide path.

DEFINITION OF KEY STATISTICS AND TERMS

- **Returns:** A percentage figure used when reporting historical average compounded rate of investment return. All returns are annualized if the period for which they are calculated exceeds one year.
- **Universe Comparison:** The universe compares the fund's returns to a group of other investment portfolios with similar investment strategies. The returns for the fund, the index and the universe percentiles are displayed. A percentile ranking of 1 is the best, while a percentile ranking of 100 is the worst. For example, a ranking of 50 indicates the fund outperformed half of the universe. A ranking of 25 indicates the fund was in the top 25% of the universe, outperforming 75%.
- **Returns In Up/Down Markets:** This measures how the fund performed in both up and down markets. The methodology is to segregate the performance for each time period into the quarters in which the market, as defined by the index, was positive and negative. Quarters with negative index returns are treated as down markets, and quarters with positive index returns are treated as up markets. Thus, in a 3 year or 12 quarter period, there might be 4 down quarters and 8 up quarters. A simple arithmetic average of returns is calculated for the fund and the index based on the up quarters. A simple arithmetic average of returns is calculated for the fund and the index based on the down quarters. The up market capture ratio is the ratio of the fund's return in up markets to the index. The down market capture ratio is the ratio of the fund's return in down markets to the index. Ideally, the fund would have a greater up market capture ratio than down market capture ratio.
- **Standard Deviation:** Standard deviation is a statistical measure of the range of performance within which the total returns of a fund fall. When a fund has a high standard deviation, the range of performance is very wide, meaning there is a greater volatility. Approximately 68% of the time, the total return of any given fund will differ from the average total return by no more than plus or minus the standard deviation figure. Ninety-five percent of the time, a fund's total return will be within a range of plus or minus two times the standard deviation from the average total return. If the quarterly or monthly returns are all the same the standard deviation will be zero. The more they vary from one another, the higher the standard deviation. Standard deviation can be misleading as a risk indicator for funds with high total returns because large positive deviations will increase the standard deviation without a corresponding increase in the risk of the fund. While positive volatility is welcome, negative is not.
- **R-Squared:** This reflects the percentage of a fund's movements that are explained by movements in its benchmark index. An R-squared of 100 means that all movements of a fund are completely explained by movements in the index. Conversely, a low R-squared indicates very few of the fund's movements are explained by movements in the benchmark index. R-squared can also be used to ascertain the significance of a particular beta. Generally, a higher R-squared will indicate a more reliable beta figure. If the R-squared is lower, then the beta is less relevant to the fund's performance. A measure of diversification, R-squared indicates the extent to which fluctuations in portfolio returns are explained by market. An R-squared = 0.70 implies that 70% of the fluctuation in a portfolio's return is explained by the fluctuation in the market. In this instance, overweighting or underweighting of industry groups or individual securities is responsible for 30% of the fund's movement.
- **Beta:** This is a measure of a fund's market risk. The beta of the market is 1.00. Accordingly, a fund with a 1.10 beta is expected to perform 10% better than the market in up markets and 10% worse than the market in down markets. It is important to note, however, a low fund beta does not imply the fund has a low level of volatility; rather, a low beta means only that the fund's market-related risk is low. Because beta analyzes the market risk of a fund by showing how responsive the fund is to the market, its usefulness depends on the degree to which the markets determine the fund's total risk (indicated by R-squared).
- **Alpha:** The Alpha is the nonsystematic return, or the return that can't be attributed to the market. It can be thought of as how the manager performed if the market's return was zero. A positive alpha implies the manager added value to the return of the portfolio over that of the market. A negative alpha implies the manager did not contribute any value over the performance of the market.
- **Sharpe Ratio:** The Sharpe ratio is the excess return per unit of total risk as measured by standard deviation. Higher numbers are better, indicating more return for the level of risk experienced. The ratio is a fund's return minus the risk-free rate of return (30-day T-Bill rate) divided by the fund's standard deviation. The higher the Sharpe ratio, the more reward you are receiving per unit of total risk. This measure can be used to rank the performance of mutual funds or other portfolios.
- **Treynor Ratio:** The Treynor ratio measures returns earned in excess of that which could have been earned on a riskless investment per each unit of market risk. The ratio relates excess return over the risk-free rate to the additional risk taken; however, systematic risk is used instead of total risk. The Treynor ratio is similar to the Sharpe ratio, except in the fact that it uses the beta to evaluate the returns rather than the standard deviation of portfolio returns. High values mean better return for risk taken.

- **Tracking Error:** Tracking error measures the volatility of the difference in annual returns between the manager and the index. This value is calculated by measuring the standard deviation of the difference between the manager and index returns. For example, a tracking error of +/- 5 would mean there is about a 68% chance (1 standard deviation event) that the manager's returns will fall within +/- 5% of the benchmark's annual return.
- **Information Ratio:** The information ratio is a measure of the consistency of excess return. This value is determined by taking the annualized excess return over a benchmark (style benchmark by default) and dividing it by the standard deviation of excess return.
- **Consistency:** Consistency shows the percent of the periods the fund has beaten the index and the percent of the periods the index has beat the fund. A high average for the fund (e.g., over 50) is desirable, indicating the fund has beaten the index frequently.
- **Downside Risk:** Downside risk is a measure similar to standard deviation but focuses only on the negative movements of the return series. It is calculated by taking the standard deviation of the negative quarterly set of returns. The higher the factor, the riskier the product.
- **M-Squared:** M-squared, or the Modigliani risk-adjusted performance measure is used to characterize how well a portfolio's return rewards an investor for the amount of risk taken, relative to that of some benchmark portfolio and to the risk-free rate.

DEFINITION OF KEY PRIVATE EQUITY TERMS

- **PIC (Paid in Capital):** The amount of committed capital that has been transferred from the limited partner to the general partner.
- **TVPI (Total Value to Paid in Capital):** Money returned to limited partners plus the fund's unrealized investments, divided by money paid-in to the partnership. The TVPI should equal RVPI plus DPI.
- **DPI (Distribution to Paid In Capital):** Money returned (distributions) to limited partners divided by money paid in to the partnership. Also called cash-on-cash multiple.
- **RVPI (Residual Value to Paid In Capital):** The value of a fund's unrealized investments divided by money paid-in to the partnership.
- **Internal rate of return (IRR):** This is the most appropriate performance benchmark for private equity investments. It is a time-weighted return expressed as a percentage. IRR uses the present sum of cash drawdowns (money invested), the present value of distributions (money returned from investments) and the current value of unrealized investments and applies a discount.
- **Commitment:** Every investor in a private equity fund commits to investing a specified sum of money in the fund partnership over a specified period of time. The fund records this as the limited partnership's capital commitment. The sum of capital commitments is equal to the size of the fund.
- **Capital Distribution:** These are the returns that an investor in a private equity fund receives. It is the income and capital realized from investments less expenses and liabilities. Once a limited partner has had their cost of investment returned, further distributions are actual profit. The partnership agreement determines the timing of distributions to the limited partner. It will also determine how profits are divided among the limited partners and general partner.
- **Carried Interest:** The share of profits that the fund manager is due once it has returned the cost of investment to investors. Carried interest is normally expressed as a percentage of the total profits of the fund.
- **Co-Investment:** Co-Investments are minority investments made alongside a private equity investor in an LBO, a recapitalization, or an expansion capital transaction. It is a passive, non-controlling investment, as the private equity firm involved will typically exercise control and perform monitoring functions.
- **General Partner (GP):** This can refer to the top-ranking partners at a private equity firm as well as the firm managing the private equity fund.
- **GP Commitments:** It is normal practice for the GP managing a private equity fund to also make a financial commitment to the fund on the same basis as the LPs in the fund, and this is seen as an important factor driving the alignment of GP and LP interests. The historic benchmark for GP commitments has been 1% of the total fund size, but this is by no means universal, and many GPs commit significantly larger amounts. Furthermore, there has been a marked trend towards GPs making larger commitments to their funds over recent years.
- **Leveraged Buy-Out (LBO):** The acquisition of a company using debt and equity finance.
- **Limited Partner (LP):** Institutions or high-net-worth individuals/sophisticated investors that contribute capital to a private equity fund.
- **Public Market Equivalent (PME):** Performance measure used to evaluate performance relative to the market. It is calculated as the ratio of the discounted value of the LP's inflows divided by the discounted value of outflows, with the discounting performed using realized market returns.
- **Primaries:** An original investment vehicle that invests directly into a company or asset.

VALUATION POLICY

Fiducient Advisors does not engage an independent third-party pricing service to value securities. Our reports are generated using the security prices provided by custodians used by our clients. Our custodial pricing hierarchy is available upon request. If a client holds a security not reported by the first custodian within the hierarchy, the valuation is generated from the next custodian within the hierarchy, and so forth. Each custodian uses pricing services from outside vendors, where the vendors may generate nominally different prices. Therefore, this report can reflect minor valuation differences from those contained in a custodian's report. In rare instances where FA overrides a custodial price, prices are taken from Bloomberg.

REPORTING POLICY

This report is intended for the exclusive use of the client listed within the report. Content is privileged and confidential. Any dissemination or distribution is strictly prohibited. Information has been obtained from a variety of sources believed to be reliable though not independently verified. Any forecast represents median expectations and actual returns, volatilities and correlations will differ from forecasts. Please note each client has customized investment objectives and constraints and the investment strategy for each portfolio is based on a client-specific asset allocation model. Past performance does not indicate future performance and there is a possibility of a loss. Performance calculated net of investment fees. Certain portfolios presented may be gross of Fiducient Advisors' fees and actual performance would be reduced by investment advisory fees. This report does not represent a specific investment recommendation. Please consult with your advisor, attorney, and accountant, as appropriate, regarding specific advice.

Custodian reports are the reports that govern the account. There will be different account values between Fiducient Advisors' reports and the custodian reports based on whether the report utilizes trade date or settlement date to calculate value. Additionally, difference between values contained on reports may be caused by different accrued income values. Any forecasts represent future expectations and actual returns, volatilities and correlations will differ from forecasts. This report does not represent a specific investment recommendation. Please consult with your advisor, attorney, and accountant, as appropriate, regarding specific advice. Past performance does not indicate future performance and there is a possibility of a loss.

Manager performance for mutual funds and ETFs is based on NAV and provided by Lipper. Performance for non-mutual fund or ETF investments is based on the returns provided by managers, calculations based on a manager statement, or calculations based on a statement or data from the client's custodian. Unless specified otherwise, all returns are net of individual manager fees, represent total returns and are annualized for periods greater than one year. The deduction of fees produces a compounding effect that reduces the total rate of return over time. As an example, the effect of investment management fees on the total value of a client's portfolio assuming (a) quarterly fee assessment, (b) \$1,000,000 investment, (c) portfolio return of 8% a year, and (d) 0.50% annual investment advisory fee would be \$5,228 in the first year, and cumulative effects of \$30,342 over five years and \$73,826 over ten years. Additional information on advisory fees charged by Fiducient Advisors are described in Part 2 of the Form ADV.

MATERIAL RISKS & LIMITATIONS

Fixed Income securities are subject to interest rate risks, the risk of default and liquidity risk. U.S. investors exposed to non-U.S. fixed income may also be subject to currency risk and fluctuations.
-Liability Driven Investing (LDI) Assets

Cash may be subject to the loss of principal and over longer period of time may lose purchasing power due to inflation.
-Short Term Liquidity

Domestic Equity can be volatile. The rise or fall in prices take place for a number of reasons including, but not limited to changes to underlying company conditions, sector or industry factors, or other macro events. These may happen quickly and unpredictably.

International Equity can be volatile. The rise or fall in prices take place for a number of reasons including, but not limited to changes to underlying company conditions, sector or industry impacts, or other macro events. These may happen quickly and unpredictably. International equity allocations may also be impact by currency and/or country specific risks which may result in lower liquidity in some markets.

Real Assets can be volatile and may include asset segments that may have greater volatility than investment in traditional equity securities. Such volatility could be influenced by a myriad of factors including, but not limited to overall market volatility, changes in interest rates, political and regulatory developments, or other exogenous events like weather or natural disaster.

Private Equity involves higher risk and is suitable only for sophisticated investors. Along with traditional equity market risks, private equity investments are also subject to higher fees, lower liquidity and the potential for leverage that may amplify volatility and/or the potential loss of capital.

Private Credit involves higher risk and is suitable only for sophisticated investors. These assets are subject to interest rate risks, the risk of default and limited liquidity. U.S. investors exposed to non-U.S. private credit may also be subject to currency risk and fluctuations.

Private Real Estate involves higher risk and is suitable only for sophisticated investors. Real estate assets can be volatile and may include unique risks to the asset class like leverage and/or industry, sector or geographical concentration. Declines in real estate value may take place for a number of reasons including, but are not limited to economic conditions, change in condition of the underlying property or defaults by the borrow.

Marketable Alternatives involves higher risk and is suitable only for sophisticated investors. Along with traditional market risks, marketable alternatives are also subject to higher fees, lower liquidity and the potential for leverage that may amplify volatility or the potential for loss of capital. Additionally, short selling involved certain risks including, but not limited to additional costs, and the potential for unlimited loss on certain short sale positions.

OTHER

By regulation, closed-end funds utilizing debt for leverage must report their interest expense, as well as their income tax expense, as part of their total expense ratio. To make for a useful comparison between closed-end funds and both open-end funds and exchange-traded funds, adjusted expense ratios excluding interest and income tax expenses are utilized for closed-end funds within this report. See disclosure on closed-end fund fact sheets for information regarding the total expense ratio of each closed-end fund.

Please advise us of any changes in your objectives or circumstances.

CUSTODIAN STATEMENTS

Please remember to review the periodic statements you receive from your custodian. If you do not receive periodic statements from your custodian or notice issues with the activity reported in those statements, please contact FA or your custodian immediately.

AMITY REGIONAL SCHOOL DISTRICT NO. 5
Bethany Orange Woodbridge
25 Newton Road, Woodbridge Connecticut 06525



To: Jennifer P. Byars, Superintendent of Schools

From: Theresa Lumas, Director of Finance & Administration

Date: February 3, 2025

Re: Designation of **Final** HVAC Grant Reimbursement funds in the Capital and Nonrecurring Account

The District received an award letter dated April 5, 2023, from the Department of Administrative Services (DAS) awarding \$866,663.06 in grant funds through the HVAC Reimbursement Grant. The District received a payment of \$766,741.00 in February 2024. Two invoices, totaling \$136,822.00 for replacing the chillers and the maintenance contract for the chillers were considered ineligible. I do not expect to receive any further funding for this project.

Recently the District officially closed the project with the State. Closing the project released approximately 5% or \$40,355 held back by the State.

I am recommending the Amity Facilities Committee, Amity Finance Committee and Board of Education designate these funds as the initial payment was designated for future library media center projects. The high school library project is in the design phase and funds are not quite fully allocated. However, if there are any funds remaining after this project is complete, the funds could be appropriated toward the middle school library media center renovations. It is important to note that we will be applying for any eligible school construction funds pertaining to these projects but there is a lag time in applying and receiving the funds. Setting aside these funds when available can keep future budget requests lower and avoid borrowing costs for projects.

I am requesting the following motion to take action to recommend the Amity Board of Education designate these funds for the library media center projects. The Amity Facilities Committee approved this recommendation.

Amity Finance Committee:

Move to recommend the Amity Board of Education approve –

Amity Board of Education:

Move to approve –

... the designation of \$40,355 of HVAC grant funds for renovations to the library media centers at all three schools with the high school project slated first.

AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2024-2025

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2023-2024	2024-2025	DEC 24	CHANGE	JAN 25	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	MEMBER TOWN ALLOCATIONS	53,388,441	55,272,025	55,272,025	0	55,272,025	0	FAV
2	OTHER REVENUE	369,550	247,545	275,710	9,000	284,710	37,165	FAV
3	OTHER STATE GRANTS	839,037	922,082	795,971	(80,355)	715,616	(206,466)	UNF
4	MISCELLANEOUS INCOME	15,385	15,000	19,867	0	19,867	4,867	FAV
5	TOTAL REVENUES	54,612,413	56,456,652	56,363,573	(71,355)	56,292,218	(164,434)	UNF
6	SALARIES	29,108,667	31,251,456	31,091,832	65,295	31,157,127	(94,329)	FAV
7	BENEFITS	5,796,459	6,828,489	6,813,607	0	6,813,607	(14,882)	FAV
8	PURCHASED SERVICES	9,433,792	10,242,333	9,956,145	32,259	9,988,404	(253,929)	FAV
9	DEBT SERVICE	4,417,942	3,858,211	3,858,211	0	3,858,211	0	FAV
10	SUPPLIES (INCLUDING UTILITIES)	3,161,505	3,459,384	3,608,268	0	3,608,268	148,884	UNF
11	EQUIPMENT	169,506	200,101	216,261	0	216,261	16,160	UNF
12	IMPROVEMENTS / CONTINGENCY	272,756	392,500	373,215	0	373,215	(19,285)	FAV
13	DUES AND FEES	169,465	224,178	229,178	0	229,178	5,000	UNF
14	TRANSFER ACCOUNT	1,091,054	0	0	0	0	0	FAV
15	TOTAL EXPENDITURES	53,621,146	56,456,652	56,146,717	97,554	56,244,271	(212,381)	FAV
16	SUBTOTAL	991,268	0	216,856	(168,909)	47,947	47,947	FAV
17	PLUS: CANCELLATION OF PRIOR YEAR'S ENCUMBRANCES	59,412	0	0	0	0	0	FAV
18	DESIGNATED FOR SUBSEQUENT YEAR'S BUDGET:	0	0	0	0	0	0	FAV
19	NET BALANCE / (DEFICIT)	1,050,680	0	216,856	(168,909)	47,947	47,947	FAV

Column 7: FAV=Favorable Variance

Revenues: At or OVER budget, Expenditures: At or UNDER budget

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2024-2025**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2023-2024	2024-2025	DEC 24	CHANGE	JAN 25	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	BETHANY ALLOCATION	9,075,014	9,012,104	8,828,986	0	8,828,986	(183,118)	UNF
1a	PRIOR YEAR CREDIT BETHANY	242,337		183,118		183,118	183,118	
2	ORANGE ALLOCATION	25,388,491	27,479,040	26,964,444	0	26,964,444	(514,596)	UNF
2a	PRIOR YEAR CREDIT ORANGE	715,253		514,596		514,596	514,596	
3	WOODBIDGE ALLOCATION	17,504,540	18,780,881	18,427,914	0	18,427,914	(352,967)	UNF
3a	PRIOR YEAR CREDIT WOODBRIDGE	462,806		352,967		352,967	352,967	
4	MEMBER TOWN ALLOCATIONS	53,388,441	55,272,025	55,272,025	0	55,272,025	0	FAV
5	ATHLETICS	27,229	28,000	28,000	0	28,000	0	FAV
6	INVESTMENT INCOME	151,963	60,000	85,000	15,000	100,000	40,000	FAV
7	PARKING INCOME	32,019	31,150	31,150	0	31,150	0	FAV
8	RENTAL INCOME	33,887	25,000	21,000	(6,000)	15,000	(10,000)	UNF
9	TUITION REVENUE	124,453	103,395	110,560	0	110,560	7,165	FAV
10	TRANSPORTATION BOWA AGREEMENT	0	0	0	0	0	0	FAV
11	OTHER REVENUE	369,550	247,545	275,710	9,000	284,710	37,165	FAV
12	ADULT EDUCATION	4,521	4,754	4,754	0	4,754	0	FAV
14	SPECIAL EDUCATION GRANTS	812,416	893,928	769,117	(80,355)	688,762	(205,166)	UNF
15	TRANSPORTATION INCOME-MAGNET	22,100	23,400	22,100	0	22,100	(1,300)	UNF
16	OTHER STATE GRANTS	839,037	922,082	795,971	(80,355)	715,616	(206,466)	UNF
17	INTERGOVERNMENTAL REVENUE	0	0	0	0	0	0	FAV
18	OTHER REVENUE	15,385	15,000	19,867	0	19,867	4,867	FAV
19	TRANSFER IN	0	0	0	0	0	0	FAV
20	MISCELLANEOUS INCOME	15,385	15,000	19,867	0	19,867	4,867	FAV
21	TOTAL REVENUES	54,612,413	56,456,652	56,363,573	(71,355)	56,292,218	(164,434)	UNF

Column 7: FAV=Favorable Variance

Revenues: At or OVER budget, Expenditures: At or UNDER budget

AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2024-2025

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2023-2024	2024-2025	DEC 24	CHANGE	JAN 25	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	5111-CERTIFIED SALARIES	23,917,065	25,596,300	25,566,558	110,150	25,676,708	80,408	UNF
2	5112-CLASSIFIED SALARIES	5,191,602	5,655,156	5,525,274	(44,855)	5,480,419	(174,737)	FAV
3	SALARIES	29,108,667	31,251,456	31,091,832	65,295	31,157,127	(94,329)	FAV
4	5200-MEDICARE - ER	407,317	455,244	455,244	0	455,244	0	FAV
5	5210-FICA - ER	337,860	360,217	360,217	0	360,217	0	FAV
6	5220-WORKERS' COMPENSATION	158,561	165,818	158,586	0	158,586	(7,232)	FAV
7	5255-MEDICAL & DENTAL INSURANCE	3,611,804	4,574,718	4,549,222	0	4,549,222	(25,496)	FAV
8	5860-OPEB TRUST	265,890	291,313	291,313	0	291,313	0	FAV
9	5260-LIFE INSURANCE	48,405	64,396	64,396	0	64,396	0	FAV
10	5275-DISABILITY INSURANCE	12,106	12,062	12,062	0	12,062	0	UNF
11	5280-PENSION PLAN - CLASSIFIED	726,430	670,604	670,604	0	670,604	0	FAV
12	5281-DEFINED CONTRIBUTION RETIREMENT PLAN	189,595	197,327	197,327	0	197,327	0	FAV
13	5282-RETIREMENT SICK LEAVE - CERT	0	0	0	0	0	0	FAV
14	5283-RETIREMENT SICK LEAVE - CLASS	0	0	0	0	0	0	FAV
15	5284-SEVERANCE PAY - CERTIFIED	0	0	0	0	0	0	FAV
16	5290-UNEMPLOYMENT COMPENSATION	36,600	7,590	25,436	0	25,436	17,846	UNF
17	5291-CLOTHING ALLOWANCE	1,891	2,200	2,200	0	2,200	0	FAV
18	5292-TUITION REIMBURSEMENT	0	27,000	27,000	0	27,000	0	FAV
19	BENEFITS	5,796,459	6,828,489	6,813,607	0	6,813,607	(14,882)	FAV
20	5322-INSTRUCTIONAL PROG IMPROVEMENT	61,690	64,200	64,200	0	64,200	0	FAV
21	5327-DATA PROCESSING	132,568	138,302	138,302	0	138,302	0	FAV
22	5330-PROFESSIONAL & TECHNICAL SRVC	2,129,837	2,298,132	2,356,124	0	2,356,124	57,992	UNF
23	5440-RENTALS - LAND, BLDG, EQUIPMENT	109,700	112,566	112,566	0	112,566	0	FAV
24	5510-PUPIL TRANSPORTATION	3,833,125	4,020,506	3,948,793	33,805	3,982,598	(37,908)	FAV
25	5521-GENERAL LIABILITY INSURANCE	282,623	305,004	309,835	0	309,835	4,831	UNF
26	5550-COMMUNICATIONS: TEL, POST, ETC.	103,472	115,076	115,076	0	115,076	0	FAV
27	5560-TUITION EXPENSE	2,712,997	3,093,272	2,815,974	(1,546)	2,814,428	(278,844)	FAV
28	5590-OTHER PURCHASED SERVICES	67,780	95,275	95,275	0	95,275	0	FAV
29	PURCHASED SERVICES	9,433,792	10,242,333	9,956,145	32,259	9,988,404	(253,929)	FAV

Column 7: FAV=Favorable Variance

Revenues: At or OVER budget, Expenditures: At or UNDER budget

AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2024-2025

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2023-2024	2024-2025	DEC 24	CHANGE	JAN 25	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
30	5830-INTEREST	523,986	368,978	368,978	0	368,978	0	FAV
31	5910-REDEMPTION OF PRINCIPAL	3,893,956	3,489,233	3,489,233	0	3,489,233	0	FAV
32	DEBT SERVICE	4,417,942	3,858,211	3,858,211	0	3,858,211	0	FAV
33	5410-UTILITIES, EXCLUDING HEAT	679,399	712,402	840,511	0	840,511	128,109	UNF
34	5420-REPAIRS, MAINTENANCE & CLEANING	792,147	802,305	821,590	0	821,590	19,285	UNF
35	5611-INSTRUCTIONAL SUPPLIES	371,596	444,802	439,802	0	439,802	(5,000)	FAV
36	5613-MAINTENANCE/CUSTODIAL SUPPLIES	172,498	240,780	240,780	0	240,780	0	FAV
37	5620-OIL USED FOR HEATING	63,373	60,930	60,930	0	60,930	0	FAV
38	5621-NATURAL GAS	84,228	104,180	104,180	0	104,180	0	FAV
39	5627-TRANSPORTATION SUPPLIES	197,523	180,913	196,503	0	196,503	15,590	UNF
40	5641-TEXTS & DIGITAL RESOURCES	117,975	178,281	178,281	0	178,281	0	FAV
41	5642-LIBRARY BOOKS & PERIODICALS	17,715	20,550	20,550	0	20,550	0	FAV
42	5690-OTHER SUPPLIES	230,134	257,296	257,296	0	257,296	0	FAV
43	5695-OTHER SUPPLIES-TECHNOLOGY	434,917	456,945	447,845	0	447,845	(9,100)	FAV
44	SUPPLIES (INCLUDING UTILITIES)	3,161,505	3,459,384	3,608,268	0	3,608,268	148,884	UNF
45	5730-EQUIPMENT - NEW	36,099	2,000	2,000	0	2,000	0	FAV
46	5731-EQUIPMENT - REPLACEMENT	60,136	52,301	52,301	0	52,301	0	FAV
47	5732-EQUIPMENT - TECH - NEW	317	0	0	0	0	0	FAV
48	5733-EQUIPMENT - TECH - REPLACEMENT	72,954	145,800	161,960	0	161,960	16,160	UNF
49	EQUIPMENT	169,506	200,101	216,261	0	216,261	16,160	UNF
50	5715-IMPROVEMENTS TO BUILDING	175,146	73,500	73,500	0	73,500	0	FAV
51	5715-FACILITIES CONTINGENCY	100,000	100,000	100,000	0	100,000	0	FAV
51a	TRSF. FROM FACILITIES CONTINGENCY	-100,000	0	(19,285)	0	(19,285)	(19,285)	FAV
52	5720-IMPROVEMENTS TO SITES	97,610	69,000	69,000	0	69,000	0	FAV
53	5850-DISTRICT CONTINGENCY	137,162	150,000	150,000	0	150,000	0	FAV
53a	TRSF. FROM CONTINGENCY TO OTHER ACCTS.	-137,162	0	0	0	0	0	FAV
54	IMPROVEMENTS / CONTINGENCY	272,756	392,500	373,215	0	373,215	(19,285)	FAV

Column 7: FAV=Favorable Variance

Revenues: At or OVER budget, Expenditures: At or UNDER budget

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2024-2025**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2023-2024	2024-2025	DEC 24	CHANGE	JAN 25	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
55	5580-STAFF TRAVEL	24,997	25,888	25,888	0	25,888	0	FAV
56	5581-TRAVEL - CONFERENCES	53,964	86,855	91,855	0	91,855	5,000	UNF
57	5810-DUES & FEES	90,504	111,435	111,435	0	111,435	0	FAV
58	DUES AND FEES	169,465	224,178	229,178	0	229,178	5,000	UNF
59	5856-TRANSFER ACCOUNT	1,091,054	0	0	0		0	FAV
60	TOTAL EXPENDITURES	53,621,146	56,456,652	56,146,717	97,554	56,244,271	(212,381)	FAV
61								
Note:	RESTRICTED - RETURN TO TOWNS	1,050,680						

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES & EXPENDITURES BY CATEGORY
FINANCIAL ANALYSIS
FOR THE FISCAL YEAR 2024-2025**



January 2025

2024-2025 FORECAST

OVERVIEW

The projected unspent fund balance for this fiscal year is \$47,947 FAV, previously \$216,856 FAV, which appears on page 1, column 6, and line 19. The unspent funds from fiscal year 2024, \$1,050,680 once audited will be deducted from the town allocations in March 2025. This is comprised of \$991,268 of FY24 unspent funds and \$59,412 in FY23 unspent encumbrances. This Board approved 2% of the unspent funds as an end-of-year transfer. The appropriation request to the educational expenditure account is shown on line 59 of the Excel file. The District is legally allowed to transfer with Board approval up to 2% or \$1,091,054 of the current budget if funds become available. The item was approved at the September 2024 meeting.

REVENUES BY CATEGORY

The projected yearend balance of revenues is ***\$164,434 UNF***, previously ***\$93,079, UNF*** which appears on page 2, column 6, line 21.

LINE 5 on Page 2: ATHLETICS:

The forecast is based on the budget developed on historical payments. ***The forecast is neutral.***

LINE 6 on Page 2: INVESTMENT INCOME:

The forecast is based on the budget developed. ***The forecast is \$40,000 FAV, previously \$25,000 FAV.***

<u>Month</u>	<u>M&T Bank</u>	<u>State Treasurer's Investment Fund</u>
July 2024	.40%	5.43%
August 2024	.40%	5.41%
September 2024	.40%	5.26%
October 2024	.40%	5.00%
November 2024	.40%	4.82%
December	.40%	4.66%
January	.40%	4.46%

LINE 7 on Page 2: PARKING INCOME:

The forecast is based on the budget developed on actual payments. ***The forecast is neutral.***

LINE 8 on Page 2: RENTAL INCOME:

The forecast is based on the budget developed on estimated payments for the fiscal year. *The forecast is \$10,000 UNF, previously \$4,000 UNF.*

LINE 9 on Page 2: TUITION REVENUE:

The budget is based on seven tuition students, three at a reduced employee rates. **Full tuition rate is \$21,636.** The actual tuition charged is higher (\$578 per year). *Seven tuition students are enrolled, including three at reduced employee rates, and two students not yet moved into the District paying monthly. The forecast is \$7,165 FAV, including \$2,838 from the rate change, previously \$7,165 FAV.*

LINE 12 on Page 2: ADULT EDUCATION:

The forecast is based on historical data of State payments. *The forecast is neutral.*

LINE 14 on Page 2: SPECIAL EDUCATION GRANTS:

The current projection is based on budgeted costs for placements and transportation. The budget assumes a 68% reimbursement rate. The State passed legislation in June 2023 which increased the reimbursement rate to 85% but still capped at 68% reimbursement. This impacts the budget. *The forecast is \$205,166 UNF, previously \$124,811 UNF due to latest State reimbursement estimates projected to be a historical low rate of 60%.*

LINE 15 on Page 2: TRANSPORTATION INCOME:

The forecast is based on projected State payments and enrollment for magnet school transportation budgeted. *The forecast is \$1,300 UNF, previously neutral.*

LINE 18 on Page 2: OTHER REVENUE:

The forecast is based on the budget developed on historical payments. *The forecast is \$4,867 FAV, previously \$4,867 FAV.*

EXPENDITURES BY CATEGORY

The projected yearend balance of expenditures is *\$212,381 FAV, previously \$299,550 FAV* which appears on page 5, column 6, line 60.

LINE 1 on Page 3: 5111-CERTIFIED SALARIES:

The forecast is based on budget. There are still vacant positions. Turnover savings on positions filled to date is currently more than budgeted, \$3,339 FAV, previously \$89,409 UNF. There were 5 retirements budgeted, and only 3 retirements submitted. The salary for staff filling positions due to retirement and resignations is more than budgeted. The budget assumes new hires at step MA5, however the average of new staff is MA9 step. This does translate to a more experienced teaching staff, but not as much of a monetary savings. There is currently \$72,152 FAV from unpaid leaves. *The account is forecasted to be \$80,408 UNF, previously \$44,608 UNF. The need for substitutes has increased significantly year-over-year likely due to paid FMLA.*

LINE 2 on Page 3: 5112-CLASSIFIED SALARIES:

The forecast is based on budget. The cyber tech position was outsourced, savings of \$58,198 on the salary line. *Turnover on positions filled to date exceeds the turnover*

estimates by \$48,222 FAV, previously \$4,904 FAV. Forecast for all accounts are \$174,737 FAV, previously \$129,882 FAV. There is a significant turnover in paraeducators, several custodians and secretaries, creating gaps in filling positions. Some substitutes have been contracted through outside agencies.

LINES 4 & 5 on Page 3: 5200 & 5210-MEDICARE & FICA:

The forecast is based on budget.

LINE 6: 5220 on Page 3-WORKERS' COMPENSATION:

The workers' compensation premium is more than budgeted. The renewal policy is \$665 UNF. The District received a members' equity rebate for \$7,897 FAV. The forecast is \$7,232 FAV.

LINES 7 on Page 3: 5255-MEDICAL AND DENTAL INSURANCE:

The following charts are included to track how the District's actual claims are comparing against the expected claims. How claims are running for the year has always been a common question, so the charts for claims and fees are shown monthly. However, claims are one piece of the medical budget line shown in the Excel file. Fees, employee contributions, grant funding, employer contributions to employee HSA accounts and reserve funding are other factors built into the Medical and Dental Insurance Budget. The claims chart in the Word document will not equal the Excel line since it is only one factor of the data comprising the medical budget. Certainly claims are a significant factor which is why it is given in detail below. *Claims are forecasted to be 96.8% of budget.*

The forecast projects actual claims and fees of current employees and retirees will be neutral with the budget, however claims are more than the month-to-month forecast. The projected monthly budget is based on an average of five years of claims. One position was outsourced, projecting a savings of \$25,496 in claims and fees.

CLAIMS OF CURRENT EMPLOYEES AND RETIREES

MONTH	2024-2025 ACTUAL	2024-2025 BUDGET	VARIANCE	2023-2024 ACTUAL	2022-2023 ACTUAL
<i>JUL *</i>	\$ 347,337	\$ 370,320	\$ (22,983)	\$ 364,829	\$ 34,837
<i>AUG</i>	\$ 488,825	\$ 517,730	\$ (28,905)	\$ 641,037	\$ 798,616
<i>SEP</i>	\$ 404,062	\$ 475,645	\$ (71,583)	\$ 412,377	\$ 551,212
<i>OCT</i>	\$ 549,988	\$ 390,384	\$ 159,604	\$ 508,930	\$ 297,594
<i>NOV</i>	\$ 458,288	\$ 457,220	\$ 1,068	\$ 541,882	\$ 306,068
<i>DEC</i>	\$ 477,519	\$ 607,753	\$ (130,234)	\$ 363,042	\$ 435,108
<i>JAN</i>	\$ 328,574	\$ 391,200	\$ (62,626)	\$ 220,714	\$ 311,328
FEB	\$ 283,638	\$ 283,638	\$ -	\$ 183,906	\$ 190,062
MAR	\$ 368,489	\$ 368,489	\$ -	\$ 261,829	\$ 313,582
APR	\$ 332,509	\$ 332,509	\$ -	\$ 266,018	\$ 222,547
MAY	\$ 348,408	\$ 348,408	\$ -	\$ 456,890	\$ 486,004
JUN	\$ 348,237	\$ 348,237	\$ -	\$ 369,321	\$ 302,891
TOTALS	\$ 4,735,874	\$ 4,891,532	\$ (155,658)	\$ 4,590,775	\$ 4,249,849

ACTUAL/FORECAST CLAIMS AS A PERCENTAGE OF EXPECTED CLAIMS

2020-2021 ACTUAL	2021-2022 ACTUAL	2022-2023 ACTUAL	2023-2024 ACTUAL	2024-2025 FORECAST
75.8%	97.3%	93.6%	99.5%	96.8%

***Incomplete billing cycle in July 2023**

FEES OF CURRENT EMPLOYEES AND RETIREES (Stop-Loss Premiums, Network Access Fees, and Other Fees)

MONTH	2024-2025 ACTUAL	2024-2025 BUDGET	VARIANCE	2023-2024 ACTUAL	2022-2023 ACTUAL
JUL	\$ 50,798	\$ 37,888	\$ 12,910	\$ 44,555	\$ 30
AUG	\$ 54,969	\$ 63,533	\$ (8,564)	\$ 54,176	\$ 83,030
SEP	\$ 14,743	\$ 52,368	\$ (37,625)	\$ 53,028	\$ 61,858
OCT	\$ 53,552	\$ 54,324	\$ (772)	\$ 52,666	\$ 47,063
NOV	\$ 53,061	\$ 53,324	\$ (263)	\$ 53,732	\$ 50,445
DEC	\$ 51,875	\$ 56,241	\$ (4,366)	\$ 53,218	\$ 52,888
JAN	\$ (6,882)	\$ 45,676	\$ (52,558)	\$ 48,165	\$ 25,978
FEB	\$ 66,557	\$ 66,557	\$ -	\$ 57,785	\$ 46,388
MAR	\$ 55,147	\$ 55,147	\$ -	\$ (8,744)	\$ 74,389
APR	\$ 50,345	\$ 50,345	\$ -	\$ 46,575	\$ 43,145
MAY	\$ 54,104	\$ 54,104	\$ -	\$ 41,342	\$ 47,499
JUN	\$ 44,360	\$ 44,360	\$ -	\$ (6,272)	\$ 18,816
TOTALS	\$ 542,629	\$ 633,867	\$ (91,238)	\$ 490,226	\$ 551,529

LINE 9 on Page 3: 5260-LIFE INSURANCE:

The forecast is based on budget.

LINE 10 on Page 3: 5275-DISABILITY INSURANCE:

The forecast is based on budget.

LINE 16 on Page 3: 5290-UNEMPLOYMENT:

The forecast is based on first quarter billing, \$17,846 UNF, previously \$17,846 UNF.

LINE 22 on Page 3: 5330-PROFESSIONAL TECHNICAL SERVICES:

The forecast is projected to be over budget due to outsourcing one position for cybersecurity, \$83,694 UNF. This is offset by savings on a student device lease agreement of \$25,702 FAV. *Net for the account is currently, \$57,992 UNF, previously \$57,992 UNF.*

LINE 23 on Page 3: 5440-RENTALS:

The forecast is based on budget.

LINE 24 on Page 3: 5510-PUPIL TRANSPORTATION:

Special Education Transportation continues to fluctuate to meet student enrollment and needs. The number of students transported each month as well as the facilities students are transported to each month varies. The change month-to-month reflects students who exited programs early and lower than budgeted expenses for some students. ***The forecast including special education transportation is \$37,908 FAV, previously \$71,713 FAV for Vo-Ag and Vo-Tech bussing.*** A bus was reduced to Emmett O'Brien tech due to low enrollment, this reduction was captured in the budget and is not an additional savings. The actual Platt Tech bus cost was less than estimated, \$28,168 FAV.

LINE 25 on Page 3: 5521-GENERAL LIABILITY INSURANCE: Various liability policies, including medical professional renewed under budget, while Student Accident insurance renewed over budget. General liability is under \$3,825 FAV and medical professional coverage is under \$306 Student Accident is \$8,962 UNF. ***Account is \$4,831 UNF, previously \$4,831 UNF.***

LINE 26 on Page 3: 5550-COMMUNICATION: TEL, POST, ETC:

The forecast is based on budget.

LINE 27 on Page 3: 5560-TUITION EXPENSE:

Special Education tuition is under review as student enrollment and needs are not finalized for the start of the year. ***The forecast for these accounts is \$278,844 FAV, previously \$277,298 FAV. The tuition rate for vocational and magnet schools was reduced by the State Legislature in June 2024. Data changes based on actual student placements and services.***

Tuition for the Vo-Ag schools is based on \$106,568 FAV, previously \$104,242 FAV.

	FY20-21 ACTUAL	FY21-22 ACTUAL	FY22-23 ACTUAL	FY23-24 ACTUAL	FY24-25 BUDGET	FY24-25 FORECAST
Sound	5	3	3	3	5	4
Trumbull	3	1	3	4	4	3
Nonnewaug	7	9	7	8	8	4
Common Ground Charter HS	1	1	3	2	1	0
NH Coop Arts	0	0	0	0	0	1
Hill Career Magnet	0	0	1	0	0	0
Wintergreen Magnet	0	1	0	0	0	0
Marine Science Magnet HS	0	0	1	0	0	0
Engineering Science Magnet	0	0	0	0	0	1

Lyman Hall-Vo-AG School	0	0	0	0	0	<i>1</i>
Totals	16	15	20	17	18	14

ECA is \$53,254 FAV, previously \$53,254 FAV.

	FY20-21 ACTUAL	FY21-22 ACTUAL	FY22-23 ACTUAL	FY23-24 ACTUAL	FY24-25 BUDGET	FY24-25 FORECAST
ECA	16	18	19	19	19	19

Public (ACES) and private out-of-district placements are \$119,022 FAV, previously \$73,737 FAV.

	FY20-21 ACTUAL	FY21-22 ACTUAL	FY22-23 ACTUAL	FY23-24 ACTUAL	FY24-25 BUDGET	FY24-25 FORECAST
Public SPED	6	10	9	8	11	9
Private SPED	27	20	16	19	16	15
Totals	33	30	25	27	27	24(25)

LINE 33 on Page 4: 5410-UTILITIES, EXCLUDING HEAT:

The 2024-2025 budget for electricity assumes the use of 3,377,000 kilowatt hours at an average price of 0.07988 or a cost of \$620,567 with delivery charges. Forecast is \$125,000 UNF due to delivery and public benefit charges, previously \$125,000 UNF. It is difficult to estimate the supplemental charges and current rates project a \$195,000 UNF affect on the account. The forecast is projecting a slight decrease in the monthly invoices during the winter months. The winter months have decreased in the past but it is unclear if that will happen this year.

The budget for propane is \$4,635. *The forecast is neutral.*

The budget for water is \$59,200. *The forecast is neutral.*

Sewer costs are budgeted at \$31,109. *The forecast is \$3,109 UNF, previously 3,109 UNF.*

ELECTRICITY (KILOWATT HOURS)

MONTH	2024-2025 FORECAST	2024-2025 BUDGET	VARIANCE	2023-2024 ACTUAL	2022-2023 ACTUAL
<i>JUL</i>	352,636	307,438	45,198	275,363	325,263
<i>AUG</i>	341,068	339,080	1,988	339,333	350,459
<i>SEP</i>	315,393	304,849	10,544	295,827	294,292
<i>OCT</i>	302,667	278,181	24,486	250,944	252,949
<i>NOV</i>	264,619	261,922	2,697	251,734	252,160
<i>DEC</i>	259,154	259,642	(488)	233,988	245,784
JAN	275,541	275,541	-	271,629	262,051
FEB	270,438	270,438	-	255,916	259,362
MAR	255,558	255,558	-	242,795	249,254
APR	264,677	264,677	-	262,074	250,112
MAY	257,500	257,500	-	288,966	264,292
JUN	302,174	302,174	-	320,107	287,285
Totals	3,461,425	3,377,000	84,425	3,288,676	3,293,263

DEGREE DAYS

There are 3,341 degree days to date as opposed to 3,234 last year.

LINE 34 on Page 4: 5420-REPAIRS & MAINTENANCE: *The forecast is projected to be \$19,285 UNF, previously \$19,285 UNF.* A budget transfer was approved in October to cover duct cleaning at AMSO, \$9,800 UNF. A transfer request was approved in November for \$9,485 for 2 variable frequency drives damaged during the microgrid test at ARHS.

LINE 36 on Page 4: 5613-MAINTENANCE SUPPLIES: *The forecast is projected to be neutral.*

LINE 37 & 38 on Page 4: 5620 & 5621-OIL & NATURAL GAS:

The budget for natural gas is \$104,180 and the budget for oil is \$2.83 per gallon, and \$60,930 annually. *The forecast is projected to be neutral.*

LINE 39 on Page 4: 5627-TRANSPORTATION SUPPLIES: *The forecast is projected to be \$15,590 UNF, previously neutral. The amount of fuel allocated to drivers has increased in the past two years based on actual daily run mileage and two gasoline fueled busses that have different fuel allotments. This account was over budget last year and the current data indicates it will be over budget this fiscal year. The account has been adjusted in the proposed FY26 budget.*

LINE 43 on Page 4: 5695-OTHER SUPPLIES-TECHNOLOGY:

The forecast is projected to be \$9,100 FAV, previously \$9,100 FAV.

LINE 45 on Page 4: 5730-EQUIPMENT -NEW:

The forecast is projected to be neutral.

LINE 46 on Page 4: 5731-EQUIPMENT -REPLACEMENT:

The forecast is projected to be neutral.

LINE 48 on Page 4: 5733-EQUIPMENT –TECHNOLOGY-REPLACEMENT:

The forecast is projected to be \$16,160 UNF, previously \$16,160 UNF. A transfer was approved in October to cover the purchase of an additional 20 teacher devices (40 in total).

LINE 51 on Page 4: 5715-FACILITIES CONTINGENCY:

The budget includes a \$100,000 contingency for unplanned, necessary facility expenditures. The forecast assumes these funds will be entirely used. A transfer request was approved for \$9,800 for duct cleaning at AMSO. A transfer request was approved in November for \$9,485 for 2 variable frequency drives damaged during the microgrid test at ARHS. **The facilities contingency balance is \$80,715.**

LINE 53 on Page 4: 5850-CONTINGENCY:

The budget includes a \$150,000 contingency for unplanned, necessary expenditures. The forecast assumes these funds will be entirely used.

LINE 59 on Page 5: 5856-TRANSFER:

This line is used to identify funds for the Educational Expenditures Reserve transfers. The District is legally allowed to transfer with Board approval up to 2% or \$1,129,132 of the current budget. The item will be presented after the final balance for the FY25 is confirmed at the August/September 2025 meeting.

LINE 61 on Page 5: RESTRICTED: RETURN TO TOWNS:

The line is for the unspent funds from FY24. The audited amount of unspent funds of \$1,050,680 FAV will be credited to the member towns' March allocations. This is comprised of \$991,268 of unspent funds in FY24 and unliquidated encumbrances from FY23 of \$59,412. ***The town allocations will be reduced in March 2025.***

APPENDIX A

COST SAVINGS AND EFFICIENCIES FOR FISCAL YEAR 2024-2025

TOTAL ANNUAL SAVINGS TO-DATE OF: \$48,627

\$7,055 Cable Advisory Grant: The District will use these funds for cameras.

\$21,138 E-Rate Credits: The District's application for E-Rate credits is submitted. The amount will reflect discounted invoices for the CEN – state provided internet connection.

\$20,433 Pegpetia Grant: The District's application for Pegpetia funds was approved. The District used these funds for new transmission, switching, and streaming systems for both of Amity's Middle Schools. This will provide students with a stable platform from which students may produce live events or live-to-tape events. Students can collaboratively work to produce and stream morning announcements, student video projects, student news segments, guest speakers, school presentations.

There is a detailed history of the District's efforts to save dollars and operate efficiently. This information is posted on the District's website:

- Energy Savings Initiatives for the past decade
<http://www.amityregion5.org/boe/sub-committees/finance-committee>
- District recognized CQIA Innovation Prize for Fostering a District Culture of Maximizing Cost Savings and Efficiencies
<http://www.amityregion5.org/boe/sub-committees/finance-committee2>
- Fiscal Year 2023-2024 - \$965,771
- Fiscal Year 2022-2023 - \$ 42,565
- Fiscal Year 2021-2022 - \$ 78,854
- Fiscal Year 2020-2021 - \$128,708
- Fiscal Year 2019-2020 - \$ 43,497
- Fiscal Year 2018-2019 - \$ 52,451
- Fiscal Year 2017-2018 - \$746,688
- Fiscal Year 2016-2017 - \$595,302
- Fiscal Year 2015-2016 - \$125,911
- Fiscal Year 2014-2015 - \$139,721
- <http://www.amityregion5.org/boe/sub-committees/finance-committee>

APPENDIX B

MONTHLY FORECASTS: PURPOSE, METHODOLOGY, HISTORICAL

PURPOSE & METHODOLOGY:

A forecast is a prediction or estimate of future events and trends. **It is only as good as the data available and the assumptions used.** We use current information and past history.

There are many factors, which can significantly impact expenditures, both positively and negatively (e.g., staff turnover, vacancies and leaves-of absence; medical and dental insurance claims when self-insured; special education expenditures; major facility repairs; snow removal).

Two of the three past fiscal years were significantly impacted by the COVID-19 pandemic. School operations were halted or modified and not at 100% for either year. The District staff took many steps to reserve the general operating budget to meet the demands and brace for the unknown costs. Nearly one million dollars was held from accounts to prepare for operations in fiscal year 2021. Grant funding from State and Federal sources became available during the year. These funds were used to offset unexpected costs and plan for the future costs. Some of the funds do not expire until September 2024. The administration is planning to use funds as required by grant guidelines while limiting the impact to future budgets. The most recent fiscal year, 2022, also reflects an increase from May to June forecast but is offset by an increase to the Capital Nonrecurring Account request from 1% to 2%.

To illustrate, a special education student could move into the District in mid-year and the cost impact could be over \$100,000 and/or we could have a 'bad claims year' and wipe out the Self Insurance Reserve Fund and need other funds to cover claims of current employees and retirees. If we do not have available funds to cover these and other potential shortfalls, the necessity to seek additional funding from the public would be our only option (as only the towns have a fund balance from prior years available to use in the case of an emergency).

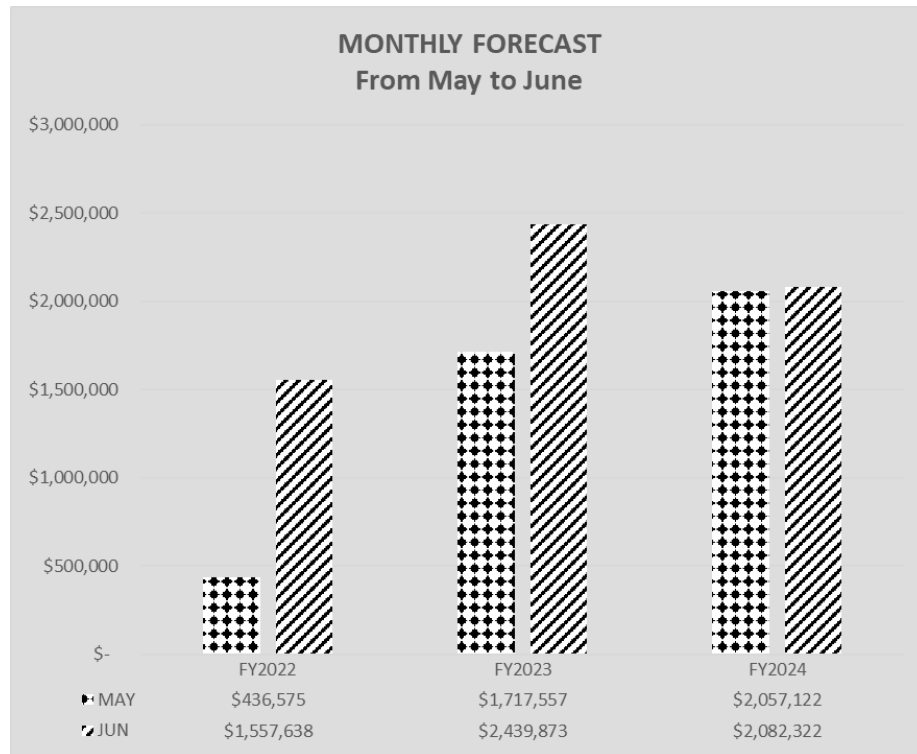
Revenues can be most impacted by decisions made at the State level for Special Education and Transportation grants. We have seen the reimbursement rate change in mid-year.

Prudent financial management is necessary. We need to be sure the total expenditures budget is never overspent (and may need to be underspent if revenues are below budget because total expenditures cannot exceed total revenues). It is imperative we 'hold back' on spending any of the Contingency Account until it is absolutely necessary or we are close to yearend. The Superintendent of Schools and Director of Finance and Administration review and approve or deny all purchase orders. We are careful to make sure funds are only spent when necessary and not just because 'it is in the budget'. We are constantly faced with the 'what-ifs' of over expenditures in certain accounts. We need to be sure there are sufficient funds available. As a result, the fund balance has been larger towards the end of the fiscal year.

Furthermore, the monthly forecasts are based on the information available. We have had large, unexpected or highly unpredictable events at the end of the fiscal year (mostly of a positive nature), which significantly changed the forecast from May to June.

HISTORICAL:

The chart below depicts the yearend balance projected in May and June of each of the past three fiscal years.



The major contributors of the significant change from the May to June forecasts are detailed below.

FY2022:

The audited fund balance is \$628,463. ***This surplus from prior year was credited to the member towns March allocation payment for FY23.*** The monthly forecast for May 2022 projected a fund balance of \$436,575 which included \$516,982 designated for the capital non-recurring account (CNR). The change is **\$1,121,063 higher than the prior month's forecast including the increase from 1% to 2% to CNR.** The major reasons for the increase in the yearend fund balance from one month to the next month were, as follows:

- **\$102,543:** Certified and classified salaries were lower than forecasted. It is not until the end of the fiscal year when we know the actual expenditures for coverages, substitutes, leaves of absences, overtime, and pay docks. Many unpaid leaves occur at the end of the school year. We use conservative estimates in the forecasts based on past history. Overtime and substitute needs are greatest in the final months of the school year due to many extracurricular activities. We hired more in-house substitutes to offset outside agency costs and it proved to be effective.

- **\$33,278:** Medical insurance claims and associated costs were \$27,846 lower than expected. Since we are self-insured, actual claims are not known until the end of the fiscal year. Payroll taxes, life insurance and defined contribution payments were less based on vacant positions.
- **\$344,647** Purchased services were lower than forecasted. This included \$57,363 lower transportation and rental costs for athletics. Transportation needs are partially determined by a team's advancement in tournament play during the year and are difficult to gage. Athletics rentals of all weather fields at other location for teams' practice experience was not needed and other facility rentals were lower than anticipated. Special education transportation and tuition were also \$259,748 lower due to unexpected changes in outplacements, fewer unanticipated services than budgeted and unfilled positions in the department.
- **\$83,850:** Electrical and water consumption was lower than anticipated. Instructional supplies were less than anticipated.
- **(\$516,982) Capital and Nonrecurring (CNR) Account:** The positive variances above were offset by increasing the CNR request from 1% to 2% based on new information regarding the carrying over of fund balances. The Board approved \$929,175 or 1.80% in August 2022.

FY2023:

The audited fund balance is \$1,346,323 assuming an allocation of 2% or \$1,066,995 appropriated to Capital and Nonrecurring Account. The monthly forecast for May 2023 projected a fund balance of \$650,562. The change is **\$695,761 higher than the prior month's forecast**. The major reasons for the increase in the yearend fund balance from one month to the next month were, as follows:

- **\$142,314:** Certified and classified salaries were lower due to the staff turnover and vacancies impacting the District all year. Current staff covered additional classes, additional substitutes and consultants were hired to cover vacant positions.
- **\$141,038** Purchased services were over budget but less than anticipated. Outside consultants were contracted to provide some services for the vacant positions but not to the extent expected. Legal services and athletic services were less than anticipated.
- **\$146,772:** There continued to be changes in special education transportation needs and the final number of athletic trips was less than anticipated.
- **\$80,178:** Repairs and maintenance costs were down with the bulk being from snow removal being nearly \$30,000 under budget.

- **\$28,861:** Communication costs were lower due to savings from the E-rate grant and less postage needed due to the digital communications.
- **\$45,780:** Renewals for insurance policies due in June came in under budget including student accident and cyber insurance. Steps the District has taken to improve its digital security has resulted in lower premiums.
- **\$93,482:** Special Education tuition charges were less than budgeted due to changes in students's services and/or attendance in programs.

FY2024:

The audited fund balance is \$991,268 assuming an allocation of 2% or \$1,091,054 appropriated to Educational Expenditure Account . The monthly forecast for May 2024 projected a fund balance of \$1,129,780. The change is **\$1,229,566 higher than the prior month's forecast**. The major reasons for the increase in the yearend fund balance from one month to the next month were, as follows:

- **\$176,442:** Certified and classified salaries were lower due to the staff turnover, leaves of absences and vacancies impacting the District all year. Current staff covered additional classes, additional substitutes and consultants were hired to cover vacant positions.
- **\$535,394** Benefits were lower mostly due to medical fees, stop loss credits and OPEB adjustments.
- **\$36,626** Supplies were lower due to favorable utility consumption, unspent instructional supplies, and less maintenance supplies purchased.
- **\$295,125:** Special Education tuition charges were less than budgeted due to changes in students's services and/or attendance in programs.
- **\$12,838:** The contingency account was not fully expended as expected.

APPENDIX C

RECAP OF 2021-2022

Unspent Encumbrances Balance:

The cancellation of 2020-2021 encumbrances of \$83,471 was subtracted from the Towns' March 2023 allocation payment. We encumber funds for goods and services received by June 30th but not yet billed. In some cases, the estimated amount encumbered varies from the actual invoice (e.g., utility bill; water bill, pending special education settlements) and we do not need to spend the entire encumbrance.

The audited fund balance for 2021-2022 is \$628,463 plus \$929,175 designated for capital non-recurring projects. The source of the available funds are described below.

FINANCIAL MANAGEMENT:

\$ 363,859

Our efforts to foster a District culture of finding cost savings and efficiencies has been successful producing savings of \$25,376. Grant money was applied for and awarded to offset the cost of the CEN for savings of \$17,376. \$8,000 of maintenance work done by in-house staff rather than hiring contractors. The District saved \$132,839 on insurances by bidding contracts, utilizing self-insurance funding rather than fully insured, switching to a 401(a) retirement plan, and fully funding OPEB. The District was not fully staffed the entire year and the many vacancies resulted in a surplus, \$205,644. A portion of these funds were transferred to cover outside consultants to cover services, a portion of the funds were utilized in hiring more bench (internal) subs rather than using an outside agency, and some funds remained unspent.

SPECIAL EDUCATION (NET)

\$ 883,882

These accounts are extremely difficult to forecast. As examples, special need students can be hospitalized; move into the district or leave the district at any time; withdraw from Amity and enroll in Adult Education. Several students who were budgeted to be outplaced were not for a number of reasons. Some transportation needs were coordinated with the elementary districts to reduce the number of singletons on busses for outplacements. Any one of these events can have a significant impact, positive or negative, on the District's special education expenditures. The Director of Pupil Services has been successful in establishing suitable programs for students within the District and a number of students have returned from outplacement. A new program was established in FY22 for the middle school and its counterpart is budget for the high school in the FY23 school year. The Districts revenue derived from these changes in special education services decreased by \$182,187 which is not reflected above.

OTHER:

\$ 309,897

\$138,547 SALARIES (OTHER): "Turnover savings" from replacing teachers and other staff who retired or resigned is over budget and savings from unpaid leaves-of-absence. There were a significant vacancies during the year creating variances from the budget. The administration utilized many methods to address the vacancies including overtime, temporary staff, and outside agencies. Some positions went unfilled for a period of time despite our recruitment efforts. The District was not fully staffed at any point during the

school year. More in-house teaching substitutes were hired which reduced our costs with an outside agency and provided more stability. An outside agency was utilized to cover vacant para positions.

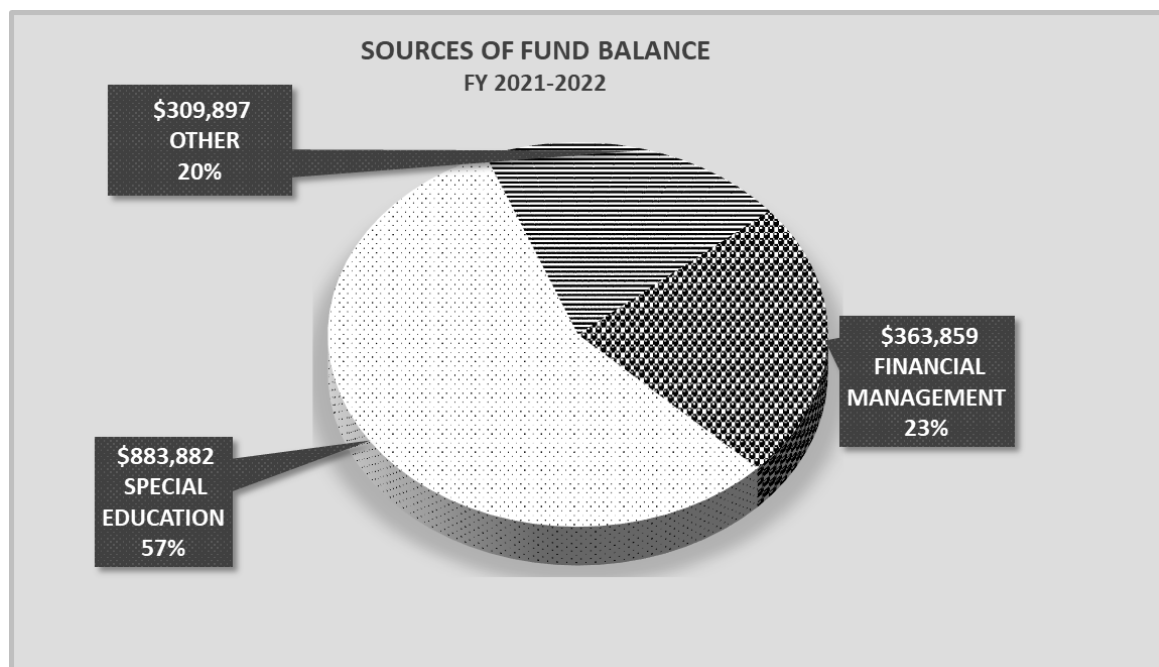
\$18,429 PURCHASED SERVICES (OTHER): Other purchased services accounts were under budget collectively by \$8,666 due to less printed materials and catered events. Data processing was under budget by \$9,763 as the administration consolidated onboarding software options at a reduced cost.

\$57,082 SUPPLIES (OTHER): Instructional supplies and transportation fuel were underbudget. Purchases for consumables was less than budgeted. Repairs and maintenance were overbudget but offset by utilities and maintenance supplies which were underbudget. These areas were reviewed during the 2022-2023 budget process and will be reviewed again during the upcoming budget process.

\$40,537 RENTALS (OTHER): Athletic rentals were down \$12,500 due to lower rentals of other facilities for teams to practice on all weather fields. Special education rental of lease space was \$28,000 lower than anticipated as the University of New Haven provided space gratis and Albertus Magnus did not have a second classroom available.

\$52,080 STAFF TRAVEL, CONFERENCES AND DUES & FEES (OTHER): Many conferences are held virtually as well as some in-district meetings. This results in lower registration fees and travel costs. Several students were award scholarships to attend conferences and contests offsetting the entrance fees..

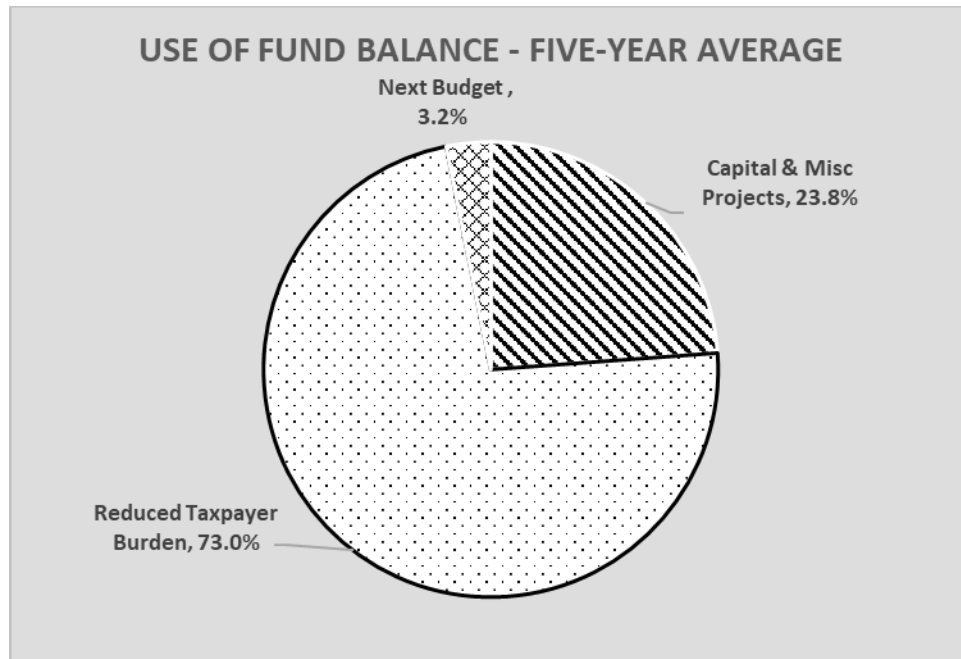
The primary sources of the fund balance are shown graphically below:



The use of the fund balance is proposed as follows:

1. **\$929,175 - 1.80%** designated to Capital Nonrecurring Reserve
2. **\$628,463** – Reduced Towns’ allocation payments in March 2023

The uses of the fund balance are shown graphically below:



Carry Over Funds:

The Board of Education approved 1.80% or \$929,175 of the FY22 surplus transferred to the Capital Nonrecurring Reserve, the audited balance is \$628,463. The FY21 unspent encumbrances and unspent funds from FY22 will be subtracted from the Towns’ March 2023 allocation payments.

APPENDIX D

RECAP OF 2022-2023

Unspent Encumbrances Balance:

The cancellation of 2021-2022 encumbrances of \$47,518 will be added to the fund balance credited to the member towns in March of 2024. We encumber funds for goods and services received by June 30th but not yet billed. In some cases, the estimated amount encumbered varies from the actual invoice (e.g., utility bill; water bill, pending special education settlements) and we do not need to spend the entire encumbrance.

The audited fund balance for 2022-2023 is \$1,372,878 plus \$1,066,995 designated for capital non-recurring projects. The source of the available funds are described below.

FINANCIAL MANAGEMENT:

\$ 352,350

Our efforts to foster a District culture of finding cost savings and efficiencies has been successful producing savings of \$42,565. Grant money was applied for and awarded to offset the cost of the CEN and cameras for the lecture hall for savings of \$31,565. At least \$11,000 of maintenance work done by in-house staff rather than hiring contractors. The District saved \$43,242 on insurances by bidding contracts and implementing additional security measures to obtain a more favorable premium for cyber insurance. The long range planning of replacing HVAC units and VFD's and the decreased number of instructional computer labs has had a favorable impact on the electricity usage of \$117,857. Instructional and custodial supplies were underspent by \$82,210 combined as staff only requested what was needed. Repairs and maintenance costs were lower due to excellent preventative maintenance and in-house repairs by \$50,000.

SPECIAL EDUCATION :

\$ 1,764,799

These accounts are extremely difficult to forecast. As examples, special need students can be hospitalized; move into the district or leave the district at any time; withdraw from Amity and enroll in Adult Education. Several students who were budgeted to be outplaced were not for a variety of reasons including moving out of the District or returning to District programs. Some transportation needs were coordinated with the elementary districts to reduce the number of singletons on busses for outplacements. Any one of these events can have a significant impact, positive or negative, on the District's special education expenditures. The Director of Pupil Services has been successful in establishing suitable programs for students within the District and a number of students have returned from outplacement. Programs established in FY22 for the middle school and its counterpart for the high school in the FY23 school year help keep out of district costs down. The Districts receives revenue directly correlated to special education services and that revenue decreased by \$294,610 which is not reflected above.

OTHER:

\$ 287,004

\$430,900 SALARIES (OTHER): "Turnover savings" from replacing teachers and other staff who retired or resigned is over budget and savings from unpaid leaves-of-absence. There were a significant number of vacancies during the year creating variances from the budget. The administration utilized many methods to address the vacancies including overtime, temporary staff, and outside agencies. Some positions went unfilled for a period

of long periods of time despite our recruitment efforts. More in-house teaching substitutes were hired which reduced our costs with an outside agency and provided more stability. An outside agency was utilized to cover vacant para positions. The District was not fully staffed the entire year and the many vacancies resulted in a surplus, \$676,158. A portion of these funds were transferred to cover outside consultants to cover services, a portion of the funds were utilized in hiring more bench (internal) subs rather than using an outside agency, (\$241,695) and some funds remained unspent.

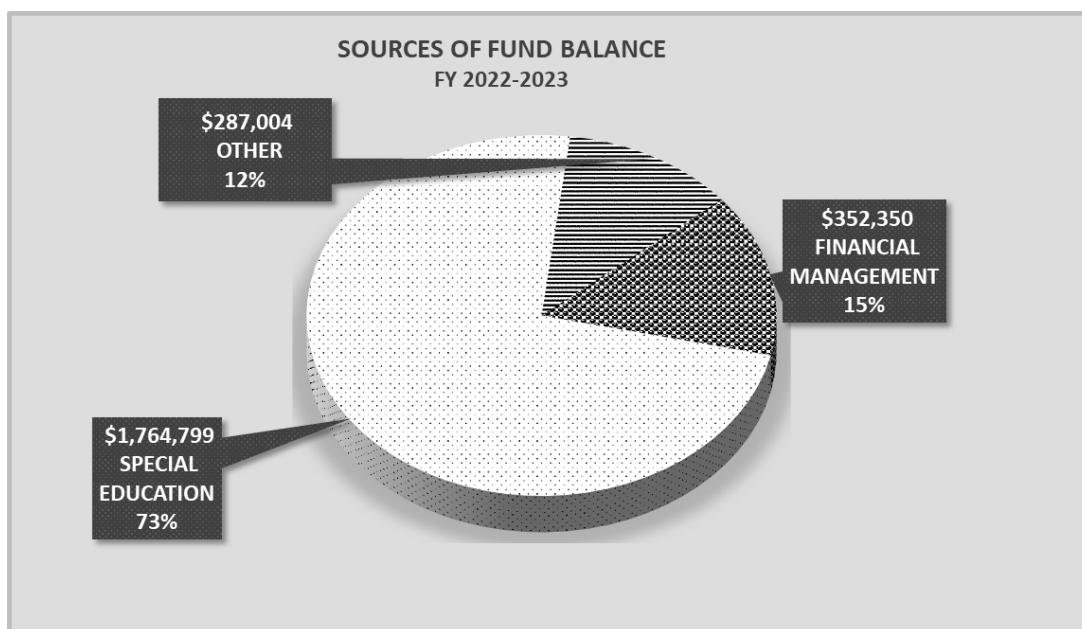
\$103,184 MEDICAL: The medical account was under budget \$103,184 due to the high staff turnover.

\$29,875 REPAIRS AND MAINTENANCE: Snow removal was under budget \$29,875 due to a mild winter.

\$41,328 STAFF TRAVEL, CONFERENCES AND DUES & FEES (OTHER): Many conferences are held virtually as well as some in-district meetings. This results in lower registration fees and travel costs. Several students were award scholarships to attend conferences and contests offsetting the entrance fees.

(\$294,783) UNPLANNED EXPENSES: The savings noted above were offset by unplanned expenses. The OPEB trust was fully funded to restore the original budget request as recommended by the actuaries, \$111,758; Unemployment costs were \$20,825 higher than anticipated and purchases for new security cameras and the required software to utilize the cameras, a new burnisher, scoreboard, replacing obsolete robots for the robotics program, and a new auto lift account for \$162,200 additional purchases.

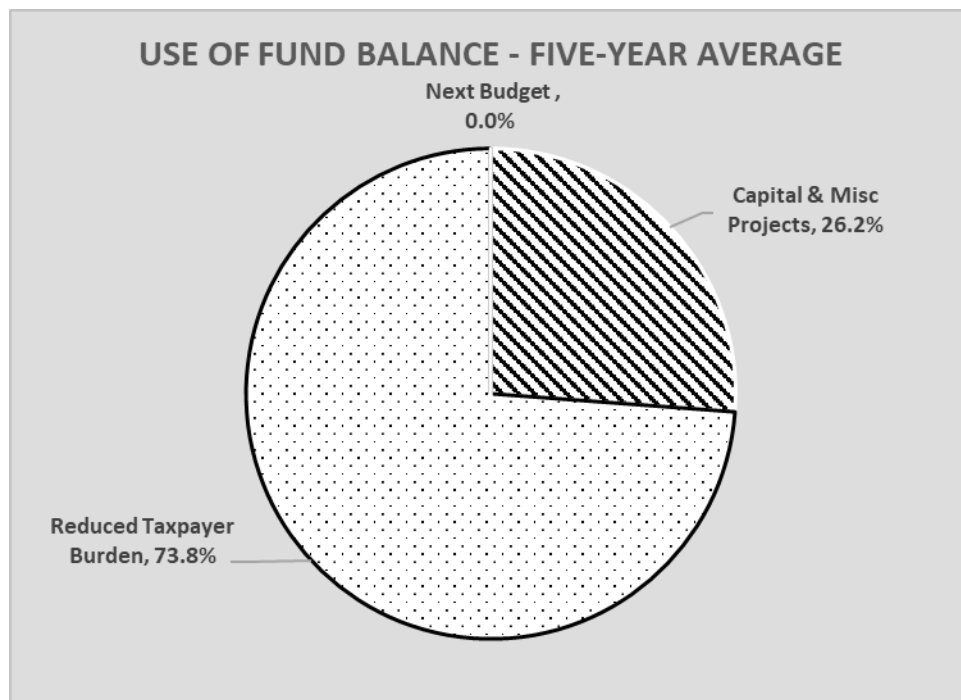
The primary sources of the fund balance are shown graphically below:



The use of the fund balance is proposed as follows:

1. **\$1,066,995 - 2.0%** approved for designation to Capital Nonrecurring Reserve
2. **\$1,372,878** – Credit of unspent fund balance to member towns upon audit completion in March 2024.

The uses of the fund balance are shown graphically below:



Unspent Funds:

The Board of Education approved 2.0% or \$1,066,995 of the FY23 surplus transferred to the Capital Nonrecurring Reserve. The audited balance is \$1,372,878. The FY22 unspent encumbrances and unspent funds from FY23 will be credited to the member towns March allocation in 2024.

APPENDIX E

RECAP OF 2023-2024

Unspent Encumbrances Balance:

The cancellation of 2022-2023 encumbrances of \$59,412 will be added to the fund balance credited to the member towns in March of 2025. We encumber funds for goods and services received by June 30th but not yet billed. In some cases, the estimated amount encumbered varies from the actual invoice (e.g., utility bill; water bill, pending special education settlements) and we do not need to spend the entire encumbrance.

The audited fund balance for 2023-2024 is \$991,628 plus \$1,091,054 designated for capital projects. The source of the available funds are described below.

FINANCIAL MANAGEMENT:

\$ 323,979

Our efforts to foster a District culture of finding cost savings and efficiencies has been successful producing savings of \$199,030. Grant money was applied for and awarded to offset the cost of the CEN and equipment for the broadcast journalism curriculum for savings of \$159,714. Used desks were purchased, saving approximately \$11,826. of maintenance work done by in-house staff rather than hiring contractors. The District saved \$46,215 on insurances partially due to implementing additional security measures to obtain a more favorable premium for cyber insurance. Custodial supplies were underspent by \$49,521 as supply closets were reorganized and inventories were used. Data processing programs were evaluated and consolidated saving \$16,375. The contingency account was not fully expended \$12,838.

SPECIAL EDUCATION:

\$ 295,125

These accounts are extremely difficult to forecast. As examples, special need students can be hospitalized; move into the district or leave the district at any time; withdraw from Amity and enroll in Adult Education. Several students who were budgeted to be outplaced were not for a variety of reasons including moving out of the District or returning to District programs. Some transportation needs were coordinated with the elementary districts to reduce the number of singletons on busses for outplacements. Any one of these events can have a significant impact, positive or negative, on the District's special education expenditures. The Director of Pupil Services has been successful in establishing suitable programs for students within the District and a number of students have returned from outplacement. Programs established in District in the past 3 years help keep out of district costs down. The Districts receives revenue directly correlated to special education services and that revenue decreased by \$153,489 which is not reflected above.

OTHER:

\$1,463,218

\$470,174 SALARIES (OTHER): "Turnover savings" from replacing teachers and other staff who retired or resigned is over budget and savings from unpaid leaves-of-absence. There were a significant number of vacancies during the year creating variances from the budget. The administration utilized many methods to address the vacancies including overtime, temporary staff, and outside agencies. Some positions went unfilled for long periods of time despite our recruitment efforts. More in-house teaching substitutes were hired which reduced our costs with an outside agency and provided more stability. An

outside agency was utilized to cover vacant para positions. Turnover savings were exceeded by \$284,218 and leave of absences were \$185,956.

\$28,905 PAYROLL TAXES: Due to lower than budgeted salaries, payroll taxes were underbudget.

\$752,473 MEDICAL: Claims were \$21,672 FAV and the stop-loss credits were \$162,682 FAV. Fees were \$96,937 FAV due to rebates credits applied from Anthem. Internally, the actual costs for employer contributions for H.S.A. accounts and actual employee premium contribution were \$83,585 FAV, OPEB credits for retirees are \$176,512 FAV, \$161,849 FAV of reserve applied, and grant funding are all favorable, \$49,142.

\$66,652 TEXTBOOKS & SUPPLIES: Staff utilized different resources than planned and Mr. Purcaro, Assistant Superintendent, negotiated favorable textbook pricing.

\$30,263 STAFF TRAVEL, CONFERENCES AND DUES & FEES (OTHER): Some staff did not attend conferences as planned due to resignations or scheduling constraints. This results in lower registration fees and travel costs. Several students competitions were still virtual, had capped the number of participants, and have not raised entry fees as anticipated.

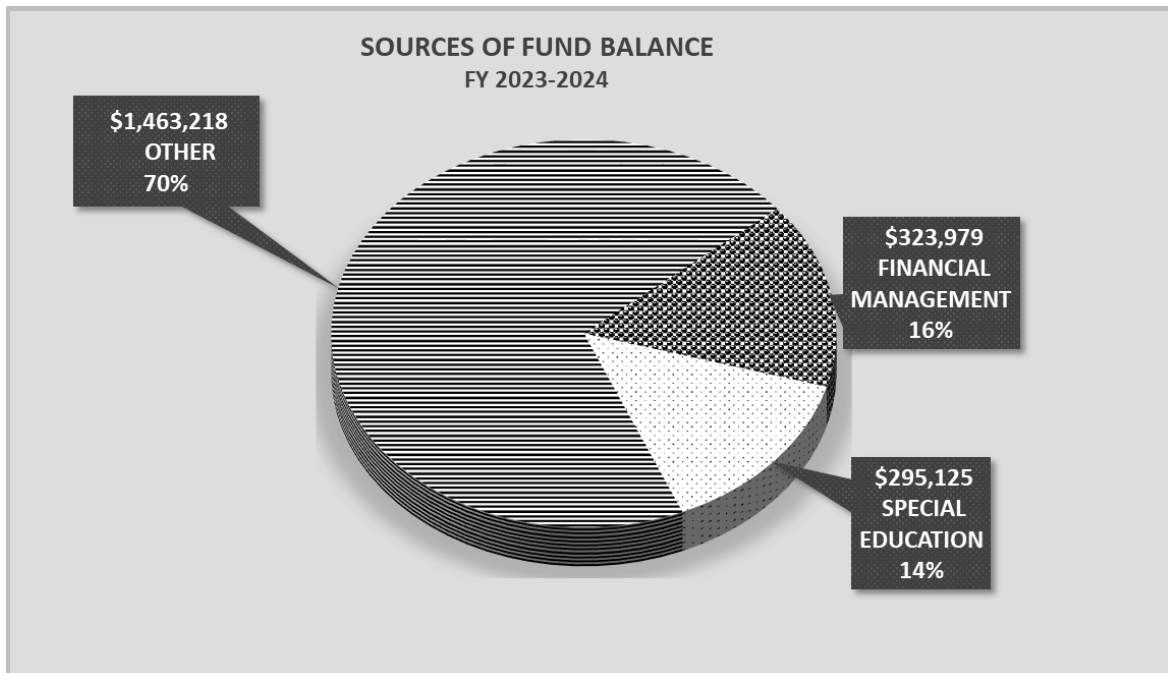
\$63,947 UTILITIES: Electricity, natural gas and oil were all under budget due to a mild winter and cooler spring.

\$19,750 OTHER PURCHASE SERVICES: Costs for printed programs for graduation, college fair, CPR training for athletics, and meeting refreshments were under budget.

\$16,375 DATA PROCESSING: Financial and human resources software were reviewed and utilized in an more efficient manner, allowing the cancellation of a program that bridged data between the two systems.

\$12,838 CONTINGENCY: The District did not need to utilize all of the contingency funds for unplanned purchases.

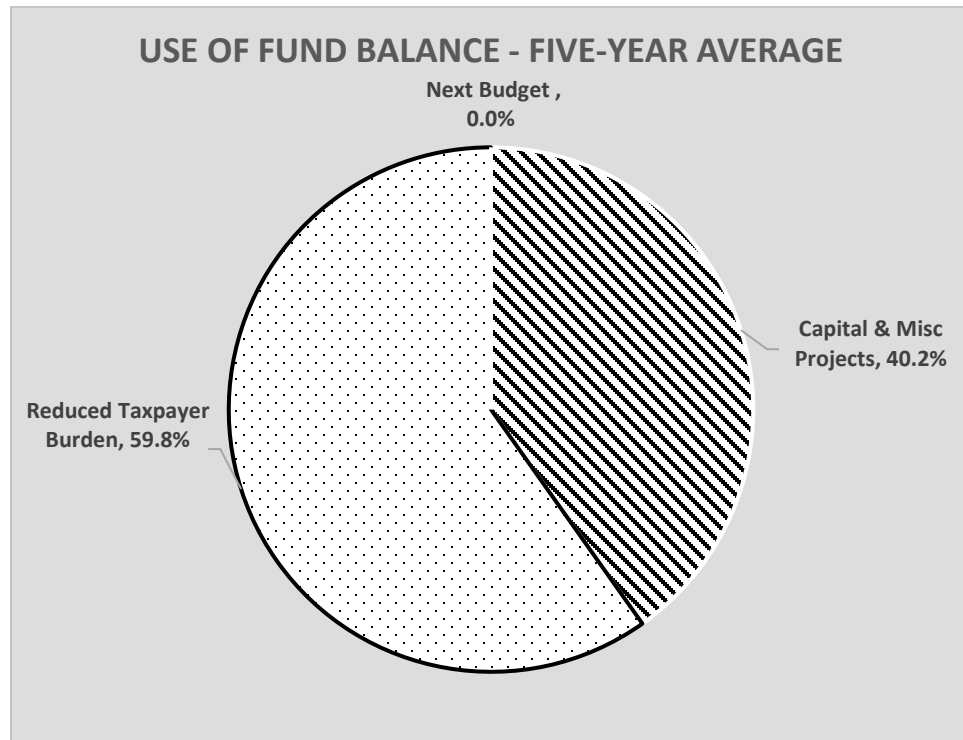
The primary sources of the fund balance are shown graphically below:



The use of the fund balance is proposed as follows:

1. **\$1,091,054 - 2.0%** was approved in September for designation to Educational Expenditure Reserve for the library media renovations.
2. **\$991,268** – Credit of unspent fund balance to member towns upon audit completion in March 2025.

The uses of the fund balance are shown graphically below:



Unspent Funds:

The Board of Education approved 2.0% or \$1,091,054 of the FY24 unspent funds transferred to the Educational Expenditure Reserve. The audited balance is \$991,268. The FY23 unspent encumbrances of \$59,412 and unspent funds from FY24 will be credited to the member towns March allocation in 2025.

Amity Regional School District No. 5 - Budget Transfers 2024-2025

<u>MONTH/YR</u>	<u>JNL#</u>	<u>ACCOUNT NUMBER & DESCRIPTION</u>	<u>AMOUNT</u>	<u>DESCRIPTION</u>
JUL				
no entries				
AUG				
AUG '2024	7 1	-01-11-1014-5611 INSTRUCTIONAL SUPPLIES	\$ (10.00)	HIST. MEMBERSHIP TO NCSS
AUG '2024	7 1	-01-11-1014-5810 DUES & FEES	\$ 10.00	HIST. MEMBERSHIP TO NCSS
AUG '2024	51 1	-02-11-1009-5611 INSTRUCTIONAL SUPPLIES	\$ (1.00)	TEXTBOOK PURCHASE
AUG '2024	51 1	-02-11-1009-5641 TEXTBOOKS	\$ 1.00	TEXTBOOK PURCHASE
SEPT				
SEPT '2024	2 1	-02-13-2220-5611 INSTRUCTIONAL SUPPLIES	\$ (550.00)	Replace broken laminator
SEPT '2024	2 1	-02-13-2220-5731 EQUIPMENT - REPLACEMENT	\$ 550.00	Replace broken laminator
SEPT '2024	26 1	-01-11-1009-5611 INSTRUCTIONAL SUPPLIES	\$ (100.00)	MATHCOUNTS REGISTRATION INCREA
SEPT '2024	26 1	-01-11-1009-5810 DUES & FEES	\$ 100.00	MATHCOUNTS REGISTRATION INCREA
SEPT '2024	30 1	-02-14-2219-5611 INSTRUCTIONAL SUPPLIES	\$ (995.00)	TO PURCHASE LICENSE FOR CLASS
SEPT '2024	30 1	-02-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 995.00	TO PURCHASE LICENSE FOR CLASS
SEPT '2024	175 1	-01-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 685.00	Soundtrap-Added Enrollment
SEPT '2024	175 1	-01-11-1010-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (685.00)	Soundtrap-Added Enrollment
SEPT '2024	182 1	-04-13-2190-5810 DUES & FEES	\$ (75.00)	REGISTRATION FOR NYASP CONNCAS
SEPT '2024	182 1	-04-13-2190-5581 TRAVEL - CONFERENCES	\$ 75.00	REGISTRATION FOR NYASP CONNCAS
OCT				
OCT '2024	15 1	-02-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 119.00	Add. Subscrib.Flango-WL
OCT '2024	15 1	-02-11-1006-5611 INSTRUCTIONAL SUPPLIES	\$ (119.00)	Add. Subscrib.Flango-WL
OCT '2024	20 1	-04-12-1200-5611 INSTRUCTIONAL SUPPLIES	\$ (88.00)	RESOURCE SUPPLIES
OCT '2024	20 1	-04-12-1200-5690 OTHER SUPPLIES	\$ 88.00	RESOURCE SUPPLIES
OCT '2024	155 1	-01-13-2400-5810 DUES & FEES	\$ (50.00)	REGIS. TO SCI. & ENG. FAIR
OCT '2024	155 1	-01-11-1013-5810 DUES & FEES	\$ 50.00	REGIS. TO SCI. & ENG. FAIR
NOV				
NOV '2024	26 1	-02-11-1006-5611 INSTRUCTIONAL SUPPLIES	\$ (150.00)	FOR VIRTUAL AUTHOR VISIT
NOV '2024	26 1	-02-11-1006-5330 PROFESSIONAL & TECH SRVC	\$ 150.00	FOR VIRTUAL AUTHOR VISIT
NOV '2024	53 1	-01-13-2400-5330 PROFESSIONAL & TECH SRVC	\$ (523.00)	DESK FOR PRINCIPAL
NOV '2024	53 1	-01-13-2400-5730 EQUIPMENT - NEW	\$ 523.00	DESK FOR PRINCIPAL
NOV '2024	86 1	-05-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 2,844.00	Raptor SafeSchool Module
NOV '2024	86 1	-04-12-2151-5330 PROFESSIONAL & TECH SRVC	\$ (2,844.00)	Raptor SafeSchool Module
NOV '2024	89 1	-05-14-2350-5695 TECHNOLOGY SUPPLIES	\$ (700.00)	addition subcript Piano Marvel
NOV '2024	89 1	-02-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 700.00	addition subcript Piano Marvel
NOV '2024	124 1	-03-11-1010-5611 INSTRUCTIONAL SUPPLIES	\$ (1,070.00)	transfer for soundboard replac
NOV '2024	124 1	-03-11-1010-5731 EQUIPMENT - REPLACEMENT	\$ 1,070.00	old soundboard beyond repair
DEC				
DEC '2024	14 1	-03-11-1018-5611 INSTRUCTIONAL SUPPLIES	\$ (600.00)	EL Teacher Laptop
DEC '2024	14 1	-03-11-1018-5732 EQUIPMENT-TECHNOLOGY-NEW	\$ 600.00	EL Teacher Laptop
DEC '2024	17 1	-03-11-1001-5733 EQUIPMENT-TECHNOLOGY-REPLACE	\$ (1,497.00)	SWEETWATER SOFTWARE
DEC '2024	17 1	-03-11-1010-5695 TECHNOLOGY SUPPLIES	\$ 1,497.00	SWEETWATER SOFTWARE
DEC '2024	27 1	-03-11-1009-5690 OTHER SUPPLIES	\$ 60.00	Math team supplies
DEC '2024	27 1	-03-11-1009-5641 TEXTBOOKS	\$ (60.00)	Math team supplies
DEC '2024	52 1	-02-13-2220-5330 PROFESSIONAL & TECH SRVC	\$ (125.00)	American library Association
DEC '2024	52 1	-02-13-2220-5810 DUES & FEES	\$ 125.00	American library Association
DEC '2024	163 1	-01-14-2600-5420 REPAIRS,MAINTENANCE & CLEANING	\$ (300.00)	TRANSFER FOR FMX SOFTWARE
DEC '2024	163 1	-05-14-2660-5695 TECHNOLOGY SUPPLIES	\$ 300.00	TRANSFER FOR FMX SOFTWARE
JAN				
JAN '2025	23 1	-05-13-2213-5322 INSTRUCTIONAL PROG IMPROVEMENT	\$ (2,475.00)	Building Thinking Classrooms
JAN '2025	23 1	-05-13-2212-5581 TRAVEL - CONFERENCES	\$ 2,475.00	Building Thinking Classrooms
JAN '2025	56 1	-05-13-2212-5322 INSTRUCTIONAL PROG IMPROVEMENT	\$ (500.00)	Bard Institute - ELA
JAN '2025	56 1	-05-13-2212-5581 TRAVEL - CONFERENCES	\$ 500.00	Bard Institute - ELA
JAN '2025	68 1	-01-13-2220-5611 INSTRUCTIONAL SUPPLIES	\$ (600.00)	Media Center supplies
JAN '2025	68 1	-01-13-2220-5690 OTHER SUPPLIES	\$ 600.00	Media Center supplies
JAN '2025	190 1	-04-12-6130-5560 TUITION EXPENSE	\$ (850.00)	PRNT REIMB PRIV PLCED STUDENT
JAN '2025	190 1	-04-12-1200-5581 TRAVEL - CONFERENCES	\$ 850.00	PRNT REIMB PRIV PLCED STUDENT
JAN '2025	191 1	-04-12-1200-5330 PROFESSIONAL & TECH SRVC	\$ 599.00	Educere Phys Ed Class-3 studen
JAN '2025	191 1	-03-13-2120-5590 OTHER PURCHASED SERVICES	\$ (599.00)	Educere Phys Ed Class-3 studen
JAN '2025	227 1	-05-13-2213-5322 INSTRUCTIONAL PROG IMPROVEMENT	\$ (1,489.00)	Syst.Instr.Impr.Prg Membership
JAN '2025	227 1	-05-13-2213-5810 DUES & FEES	\$ 1,489.00	Syst.Instr.Impr.Prg Membership

AMITY REGIONAL SCHOOL DISTRICT NO. 5
Bethany Orange Woodbridge
25 Newton Road, Woodbridge Connecticut 06525



Theresa Lumas
Director of Finance and Administration
terry.lumas@amityregion5.org

Phone (203) 397-4813
Fax (203) 397-4864

To: Jennifer Byars, Ed. D., Superintendent of Schools
From: Theresa Lumas, Director of Finance and Administration
Re: Board Acceptance of Gift
Date: February 4, 2025

The Parent of Amity Creative Theater Group has raised funds to donate to the Amity Drama Club. The total donation received is \$**28,750**. Board policy requires acceptance of the gift. [Gifts, Grants and Bequests Policy 3280](#)

For the Amity Board of Education:

Move to accept the cash donation from Parents of Amity Creative Theater in the amount of \$**40,000** for the Amity Drama Club.

Students

Physical Exercise and Discipline of Students

The Amity Regional Board of Education (Board) recognizes that a positive approach toward exercise and physical activity is important to the health and well-being of students. All aspects of the school experience should encourage students to have a healthy attitude toward exercise and promote the life-long enjoyment of physical activity. Therefore, when school employees impose disciplinary consequences for student misconduct during the regular day, the following restrictions shall apply:

1. Physical Activity as Punishment

School employees may NOT require students enrolled in grades K-12, inclusive, to engage in physical activity as a form of discipline during the school day.

2. Wellness Instruction

School employees shall not prevent students from participating in physical exercise during wellness instruction as a form of discipline.

This restriction does not apply to brief periods of respite/time-outs, referrals to the building administrator, or for safety reasons.

At no time shall an entire class be prevented from participating in wellness instruction or physical exercise activity as a disciplinary consequence.

The Superintendent of Schools is authorized to develop guidelines to implement this policy.

Nothing in this policy shall prevent a school employee from acting in accordance with an Individualized Education Plan (IEP) developed by the student's Planning and Placement Team (PPT).

For the purpose of this policy, "school employee" means a teacher, substitute teacher, school administrator, school superintendent, guidance counselor, psychologist, social worker, nurse, physician, school paraprofessional or coach employed by the Board or working in a public elementary, middle or high school; or any other individual who, in the performance of his or her duties, has regular contact with students and who provides services to, or on behalf of students enrolled in a public elementary, middle or high school, pursuant to a contract with the Board.

Any employee who fails to comply with this policy will be subject to discipline, up to and including termination of employment. Any contracted individual who provides services to or on behalf of District students and who fails to comply with the requirements of this policy may be subject to having his/her contract for services suspended by the District.

(cf. 6142.101 – Student Nutrition and Physical Activity (Student Wellness Policy))

Students

Physical Exercise and Discipline of Students

Legal Reference: Connecticut General Statutes

10-221o Lunch periods. Recess

10-221u Boards to adopt policies addressing the use of physical activity as discipline.

PA 22-81 An Act Expanding Preschool and Mental and Behavioral Services for Children

~~10-221o Lunch periods. Recess (as amended by P.A. 12-116, An Act Concerning Educational Reform, and P.A. 13-173, An Act Concerning Childhood Obesity and Physical Exercise in Schools)~~

Students

Students/Probation/Police/Courts

Notification to Superintendent when Student Arrested for Felony

Police who arrest an enrolled district student, ages seven to twenty, for a Class A misdemeanor or felony are required by Public Act 94-221 and Public Act 95-304 to notify orally the Superintendent of Schools not later than the school day following the arrest of the identity of the student and the offense or offenses for which the student was arrested and follow up in writing, including a brief description of the incident, not later than seventy-two hours of the arrest.

The Superintendent shall keep this information confidential in accordance with 46b-124 and in a secure location and disclosed only to the Administrator of the school in which such person is a student or to the Administrator or supervisory agent of any other school in which the Superintendent knows such person is a student. The Administrator may disclose the information only to special services staff or a consultant (such as a psychiatrist, psychologist, or social worker) for the purpose of assessing the danger posed by such person to him/herself, other students, school employees, or school property and to effect an appropriate modification of such person's educational plan or placement, and for disciplinary purposes.

Attendance of Students Placed on Probation by a Court

Before allowing a student placed on probation to return to school, the Connecticut court will request from the Superintendent of Schools information on the attendance, adjustment, and behavior of the student along with the Superintendent's recommendation for conditions of sentencing or disposition of the case.

School Officials and Probation Investigations

If requested by the court prior to disposition of a case, the Superintendent of Schools, or designee, shall provide information on a student's attendance, adjustment, and behavior, and any recommendations regarding the proposed conditions of probation included in the probation officer's investigation report.

School Attendance as a Condition of Probation

Under section 46b-140, a court may include regular school attendance and compliance with school policies on student conduct and discipline as a condition of probation. Information to Superintendents on a Student Ad judged to be a Delinque nt as a Result of Felony

Under section 46b-124 of CGS, courts are required to release the identity of a student adjudged a delinquent as a result of felony to the Superintendent of Schools who may only use this information for school placement and disciplinary decisions.

Information to Superintendents on a Student Adjudged to be a Youthful Offender

Under section 54-761 of CGS, courts are required to release the identity of a student adjudged a

Students

Students/Probation/Police/Courts

youthful offender to the Superintendent of Schools who may only use this information for school placement and disciplinary decisions.

(cf. 5145.11 - Police in Schools)

Legal Reference: Connecticut General Statutes

46b-121 re juvenile records.

46b-124 re juvenile matters and the law.

46b-134 re school officials and probation investigations.

46b-140 re school attendance and compliance with Board policies on student conduct and discipline as a condition of probation.

54-761 re confidentiality of records on youthful offenders.

10-233a through 10-233g re student suspension, expulsion.

~~46b-121 "Juvenile matter" defined Authority of court. Fee.~~

~~46b-124 Confidentiality of records of juvenile matters.~~

~~Exceptions. 46b-134 Investigation by probation officer prior to disposition of delinquency case. Physical mental and diagnostic examination~~

~~46b-140 Disposition upon conviction of child as delinquent.~~

~~53-206c Sale, carrying and brandishing of facsimile firearms prohibited. Class B misdemeanor.~~

~~54-761 Records confidential. Exceptions.~~

~~10-233a through 10-233g re student suspension, expulsion. Public Act 94-221 Public Act 95-304~~

~~10-233h Arrested students. Reports by police to superintendent, disclosure, confidentiality.~~

Students/Personnel – Certified

Psychotropic Drug Use

The Amity Board of Education prohibits all school personnel from recommending the use of psychotropic drugs for any student enrolled within the school system. For purposes of this policy, the term "recommend" shall mean to directly or indirectly suggest that a child use psychotropic drugs.

Psychotropic drugs are defined as prescription medications for behavioral or social-emotional concerns, such as attentional deficits, impulsivity, anxiety, depression, and thought disorders, and includes, but is not limited to, stimulant medications and anti-depressants.

However, school health or mental health personnel, including school nurses or nurse practitioners, the District's Medical Advisor, school psychologists, school social workers, and school counselors may recommend that a student be evaluated by an appropriate medical practitioner.

The District shall follow procedures for identification, evaluation, placement and delivery of services to children with disabilities or suspected disabilities provided in state and federal statutes that govern special education.

The Superintendent of Schools or his/her designee shall promulgate this policy to district staff and parents/guardians of students annually and upon the registration of new students.

(cf. 5141.4 - Reporting of Child Abuse and Neglect)

Legal Reference:

Connecticut General Statutes

10-212b Policies prohibiting the recommendation of psychotropic drugs by school personnel. (as amended by PA 03-211)

46b-120. Definitions

10-76a Definitions. (as amended by PA 00-48)

10-76b State supervision of special education programs and services.

10-76d Duties and powers of boards of education to provide special education programs and services. (as amended by PA 97- 114 and PA 00-48)

10-76h Special education hearing and review procedure. Mediation of disputes. (as amended by PA 00-48)

State Board of Education Regulations.

34 C.F.R. 3000 Assistance to States for Education for Handicapped Children.

Policy Reviewed:

AMITY REGIONAL SCHOOL DISTRICT NO. 5
Woodbridge, Connecticut

Students/Personnel – Certified

Psychotropic Drug Use

American with Disabilities Act, 42 U.S.C. §12101 et seq.

Individuals with Disabilities Education Act, 20 U.S.C. §1400 et seq.

Rehabilitation Act of 1973, Section 504, 29 U.S.C. § 794.

Students

Safety – School Resource Officer

In order to make schools more orderly, safer, and secure, Amity Regional School District No. 5 (ARSD) may utilize a police officer to deliver services as a School Resource Officer (SRO), as guided by a *Memorandum of Understanding* between the Board of Education (Board) and a law enforcement agency. The agreement shall address daily interactions among students, school personnel, and police officers and shall include a graduated response model for student discipline.

The Board or its designee will work in cooperation with the law enforcement agency in the placement of a School Resource Officer at Amity Regional High School. Additional ARSD facilities upon approval of the Board may also qualify for placement of an SRO. The Superintendent will make such suggestions to the Board when needed. The qualifications of school resource officers will be determined by the respective law enforcement agency.

It is understood and agreed that the Board and the Police Department officials share the following goals and objectives with regard to the School Resource Officer (SRO) Program in the schools:

1. To foster educational programs and activities that will increase student's knowledge of and respect for the law and the function of law enforcement agencies;
2. To encourage SROs to attend extra-curricular activities held at schools when possible;
3. To act swiftly and cooperatively when responding to major disruptions and flagrant criminal offenses at school such as: disorderly conduct by trespassers, the possession and/or use of weapons on campus, the sale and/or distribution of controlled substances, and riots;
4. To report serious crimes that occur on campus and to cooperate with the law enforcement officials in their investigation of crimes that occur at school;
5. To cooperate with law enforcement officials in their investigations of criminal offenses which occur off campus and;
6. To be involved in the development of ARSD and school safety/crisis plans and the execution of school safety drills.

Duties include but are not limited to:

- The observation and reporting of any unlawful act.
- The prevention of theft or misappropriation of any item of value.
- The control of access to premises being protected.
- The maintenance of order and safety at public activities.
- Protection of ARSD property, students, staff, and persons and property on or about ARSD property or while attending ARSD-sponsored activities.
- Investigating and documenting specific incidents.
- Assistance in identifying, intervening, and communicating with at-risk students.
- Provision of crime prevention education.
- Promotion of a positive student attitude toward law enforcement.

Policy Reviewed:

AMITY REGIONAL SCHOOL DISTRICT NO. 5
Woodbridge, Connecticut

Students

Safety – School Resource Officer

- Operating as a liaison between the community and ARSD.

The Board shall enter into a Memorandum of Understanding (MOU) with the local police department that defines the officer's role and responsibilities. The MOU must address daily interactions among students, school personnel, and police officers and must include a graduated response model for student discipline. Any such MOU entered into, extended, updated, or amended shall include a provision requiring all school resource officers to complete, while in the performance of their duties as school resource officers and during periods when such officers are assigned to be at the school, any separate training specifically related to social-emotional learning and restorative practices provided to ARSD certified employees. The MOU will be posted on the District's website.

(cf. 5131 - Student Conduct)

(cf. 5131.5 - Vandalism)

(cf. 5131.6 - Drugs, Tobacco, Alcohol)

(cf. 5131.7 - Weapons and Dangerous Instruments)

(cf. 5131.8 - Off School Grounds Misconduct)

(cf. 5141.6 - Crisis Management)

(cf. 5142 - Safety)

(cf. 5144.1 - Use of Physical Force)

(cf. 5145.11 - Police in Schools)

(cf. 5145.12 - Search and Seizure)

Legal Reference:

Connecticut General Statutes

4-176e through 4-180a. Contested Cases. Notice. Record.

10-220 Duties of boards of education.

10-233a through 10-233f. Suspension, removal and expulsion of students, as amended by PA 95- 304, PA 96-244, and PA 98-139.

53a-3 Definitions.

53a-217b Possession of Firearms and Deadly Weapons on School Grounds.

GOALS 2000: Educate America Act, Pub. L. 103-227. 18 U.S.C. 921 Definitions.

Title III - Amendments to the Individuals with Disabilities Education Act. Sec. 314 (Local Control Over Violence)

Elementary and Secondary Act of 1965 as amended by the Gun Free Schools Act of 1994.

P.L. 105-17 The Individuals with Disabilities Act, Amendment of
AMITY REGIONAL SCHOOL DISTRICT NO. 5
Woodbridge, Connecticut

Policy Reviewed:

Students

Safety – School Resource Officer

1997.

Kyle P. Packer PPA Jane Packer v. Thomaston Board of Education.

P.A. 23-208 An Act Making Certain Revisions to the Educational Statutes.

AMITY REGIONAL SCHOOL DISTRICT NO. 5
Bethany Orange Woodbridge
25 Newton Road, Woodbridge, Connecticut 06525



Dr. Jennifer P. Byars
Superintendent of Schools

jennifer.byars@amityregion5.org
203.392.2106

February 10, 2025

To: Members of the Board of Education

From: Jennifer P. Byars, Ed.D., Superintendent of Schools

Re: Personnel Report

NEW HIRES-CERTIFIED:

- Amity Regional High School: NONE
- Amity Regional Middle School – Bethany: NONE
- Amity Regional Middle School – Orange: NONE

NEW HIRES-BENCH/LONG TERM SUBSTITUTES/TUTORS: NONE

NEW HIRES-NON-CERTIFIED:

Michele Bivona – Category I Administrative Assistant – Amity Regional High School

NEW HIRES-COACHES:

Zachary Brocklehurst – Asst. Tennis Co-Coach – 2025 Spring Season – Amity Reg. High School

Rita King – Asst. Tennis Co-Coach – 2025 Spring Season – Amity Reg. High School

TRANSFERS:

Vivienne Moore – Bench Substitute at Amity Middle School-Orange to the position of F/T Paraprofessional at Amity Middle School-Orange, effective 01/15/2025

RESIGNATIONS: NONE

RETIREMENTS: NONE