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Culture, Brand-Personality Congruence, And Product Features: Impact On Consumer’s Preference

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Brand personality has been one of the most engaging topics since the second half of the 20th century. The discussions mostly related to the effects of brand characteristics on consumer buying behavior, arguing that consumers would prefer brands that share similar personality with theirs (Govers and Schoormans, 2005). Such a phenomenon is known as brand-personality congruence (Aaker 1997). However, the effects of product features, such as technology and design, on consumer’s preference cannot be ignored (Shin 2012). Since marketers and brand managers only have limited budget and resources, the question is whether product features or brand-personality congruence plays a greater role in consumer buying behavior.

As contemporary smartphone producers are born-global or have been going global, differences in cultural effects would have a great impact on their branding and marketing strategy (Sung and Tinkham, 2005). Culture, which defines the extent that a person perceives and expresses personality, influences brand personality perception, which in turn would influence whether brand-personality congruence or product features have a greater impact on consumer preferences.

Background
Recent technology upsurge is the source of the infinitive growth of smartphone industry with innumerable types of products built with different features and personalities. In fact, the word ‘smartphone’ was coined because since 1992, traditional phones had been incorporated with smart features, such as emails, calendar, calculator, electronic note pad, and handwritten annotations (Sager, 2012). Indeed, when IBM introduced the world’s first smartphone, Simon, they advertised its unique touch-screen feature through a scene in a techno thriller, The Net, in which the main character made a phone call simply by pressing on the touch-screen of his phone (ibid.). Since then, advertising product features became a trend in smartphone industry. The Nokia 9000 Communicator’s commercial TV advertisement in 1996 solely focused on its smart features (e.g. emails and fax) besides its usability and convenience (Nokia, 1996). Apple iPhone 6’s introduction video also featured John Ive, Senior Vice President of Design, meticulously presenting its unique features and technology (Apple, 2014).

However, the line between promoting features and advertising the smartphone’s personality became blurry when Blackberry introduced its Blackberry Passport in 2014. With the tag line ‘Serious Mobility for Serious Business’, the commercial advertisement of Blackberry Passport featured people in business attire living and working in business settings (Blackberry, 2014). The commercial implied that Blackberry Passport is the smartphone exclusively for business people because its brand personality underlines the seriousness as well as sophistication.

Although it is believed that different companies have different methods to advertise their products, which method of the two has more effect on consumer preference is an important question to address. With a tight marketing and branding budget, the answer helps marketers decide whether to emphasize brand personality or product features, such as technology and design, in their marketing and branding campaigns.

Also, as discussed above, the nature of smartphone industry is to compete at a global level. In fact, for multinational organizations, the decision whether to follow adaptation or standardization often
varies among companies and industries. In smartphone industry, some producers value cultural adaptation while the others embrace global standardization, in terms of both product features and brand personality.

An example of product feature variation among cultures comes from Japan. Samsung produced its Samsung Galaxy Note II with an external antenna in this market to utilize the FM radio tuner in this country. This model did not exist in the US and Canadian market because these two countries lack this infrastructure. Samsung also provides an additional battery for all of its main products sold in Japan because of the high smartphone usage rate in this market. The Apple iPhone brand, on the other hand, maintains uniform product features for its flagship smartphones in every market around the world, excepting the fact that the company provides different charger types to match the standard of different countries.

Cultural differences also affect the perception of personality, resulting in different evaluations for brand-personality congruence. This phenomenon underlines the fact that consumers would likely purchase products whose personality is similar to their own. It occurs with publicly-consumed products, such as automobiles or smartphones (Govers and Schoormans, 2005). Consumers seek positive social evaluation through the personality of the brand they use. However, the extent to which a person would like to express their personality varies among different cultures. In cultures which hamper the act of overtly displaying personal characteristics in social setting, purchasing brands based on their personality tends to be unimportant. On the other hand, in some cultures, consumers would be likely to purchase brands that share similar personality with their actual-self or aspirational self. As a result, whether different cultures have an impact on the relationship between product features or brand-personality congruence and consumer’s preference is very significant. This helps marketers and brand managers decide whether to pursue an adaptation or standardization strategy.

Thus, this paper attempts to solve two problems. First, between brand-personality congruence and product features, which has more impact on consumer’s preference? Second, do people in different cultures (collectivism versus individualism) perceive brand-personality congruence and product features differently which results in different buying behaviors?

In order to address these important questions, we shall first offer a literature review. Second, we shall offer key hypotheses, followed by research methodology and analysis. Next, we shall offer conclusions and managerial implications.

Literature Review

We now offer a brief review on brand personality, product features, effects of brand personality and product features on consumer’s preference, and the influence of cultural differences.

**Brand Personality:** Personalities or, in other words, human characteristics embodied to a brand have received special attention for the past fifty years. Birdwell (1968) indicated that consumers preferred different brands even though the branded products were identical. One reason for this divergence, according to Sirgy (1982), was the influence of self-concept. Consumers purchase a product to retain their self-concept, or to enhance it (Malhotra, 1981; Sirgy, 1982; Govers and Schoormans, 2005). Self-congruity, however, is not always a case in consumer behavior. In many times, consumers would like to purchase products that have positive values to satisfy their aspirational self (Sirgy, 1982; Tullman, 2012). According to Sirgy (1982), this phenomenon is called ‘positive self-incongruity condition’ (p.289). This incongruity, in fact, fits well into Maslow’s hierarchy of needs. As when people are already satisfied with their physiological, safety, and belonging needs, they tend to demand self-esteem and self-actualization (Lester, 2013). Tullman (2012) agreed with this viewpoint, indicating that aspirational self often occurs when a person first sets a goal and then tries to achieve it. These demands, in turn, motivate consumers to purchase products which are not congruent with their self-concept at the moment, but are helpful in enhancing their self-esteem, and thus are potentially congruent with their personality. Specifically, buying smartphones may not be congruent with the consumer’s low-budget characteristics, but it reflects his/her self-esteem. Therefore, when this research refers to brand-personality congruence, it means the similarity between product’s personality and consumer’s self-esteem.

Aaker (1997) believed that brands have a personality that could trigger a consumer’s behavior because of the similarity between the two. Based on past research about self-concept, she agreed with the theory of similarities attract (Nias, 1979). According to Aaker (1997), the larger the congruity
between a brand personality and a customer’s characteristics, the greater the tendency that consumer would purchase the brand. Because of the correlation between brand characteristics and human personality, she argued that a brand could be personified, having the same personality with human (ibid.). With these beliefs, Aaker (1997) defined brand personality as ‘the set of human characteristics associated with a brand’ (p.347).

**Product Feature:** Before reviewing any possible effects of brand personality on consumer buying behavior, it is imperative to examine product feature as another factor that differentiates one product or one brand from the others. Compared to brand personality, product feature has received less concern in literature review. One reason could be that any product is expected to fulfill every functional quality before being offered to the marketplace (Govers and Schoormans, 2005). That said, product features, such as technology and design, still strongly influences a consumer’s decision. According to Suki (2013), product features refer to the attributes of a product that satisfy consumers’ needs and wants. This point of view was supported by Kotler and Armstrong (2013), who indicated that consumers are willing to sacrifice money for the attributes of the product they want. Describing the same term with a different direction, Norman (2004) suggested that product features create usability which differs from the aesthetic appearance of a product. These notions, in short, agree that product features offer a solution for a consumer’s problem that leads to the need for purchasing the product. This, in fact, hints that product features offer utilitarian value. Utilitarian value is the functional and practical benefits of consuming the product (Batra and Ahtola, 1990; Brakus et al., 2009). For example, if a consumer is thirsty, buying any type of bottled water is enough to satisfy him. Hedonic value, on the other hand, refers to the aesthetic and experiential benefits (Batra and Ahtola, 1990). If that thirsty consumer above has favorably experienced the unique sweetness of Coke, he would choose Coca Cola specifically. To distinguish these two values, Alex and Joseph (2012) gave an example of a fridge where its volume and cooling effects are parts of utilitarian values. Color and shape, in contrasts, are hedonic values. These attributes, however, do not offer any usability or solve any of the consumer’s problems; thus, they are not product features. This implies that hedonic values are not created by product features. Mano and Oliver (1993) argued that hedonic values are the sources of fun, pleasure, enjoyment, and excitement. This, in effect, belongs to brand personality, which is described as the combination of human personality incorporated in a product or a brand (Aaker, 1997). As a result, hedonic value is created by brand personality while utilitarian value is generated by product features.

**Research Hypotheses**

As discussed in the earlier parts, brand personality is backed by the theory of similarity attract (Nias, 1979). This means that people are willing to purchase products or brands that share similar personality with them. Following Aaker (1997), many pragmatic studies have approved the positive relationship between brand personality and human characteristics in consumer behavior. Govers and Schoormans (2005) conducted research on a typical basket of products including screwdrivers, coffee makers, soap-dispensers, and table-wines. They argued that consumer preference is greatly influenced by brand-personality congruence. Their experiment, in fact, confirmed that hypothesis. It is legitimate to assert that there is a positive correlation between consumer’s buying behavior and brand-personality congruence. Thus, our first hypothesis is:

H1: Brand-personality congruence positively influences consumer’s preference.

Just as brand personality, product features such as technology and design have an impact on consumer’s buying behavior. Several research have confirmed that successful product features embodied to a product will alter consumer’s preference in a positive way. Lee (2010) indicated that functional design and ergonomic factor of product feature have a significant influence on consumer’s preferences and satisfaction. Shin (2012), in a study on smart devices industry, explained the positive relationship between usability and the attitudes towards smartphones, and proved that product feature has positive influence on consumer’s decision. Thus, our second hypothesis is:

H2: Product features positively influence consumer’s preference.

The next question is which of these two have a stronger effect on consumer’s preference. Products these days are expected to fulfill their functional or utilitarian values reasonably well (Govers and Schoormans, 2005). Thus, the symbolic meaning (or hedonic value) of a product offers another way to differentiate itself from the mass. In fact, Alex and Joseph (2012) argued that hedonic values of a
product help strengthen the relationship between self-congruence as well as self-esteem and emotional brand attachment than utilitarian values. Thus, our third hypothesis is:

H3: Brand-personality congruence has stronger influence on consumer’s preference than product features.

The relationship between brand-personality congruence and product feature with consumer’s buying decision is often influenced by many other factors. Extant research has shown great impact of culture on the strengths and direction of a variety of relationships (Kim et al., 2004; Shin, 2012). Therefore, it is reasonably reliable that cultural factors also place a significant influence on brand personality and product feature. Thus, in this paper, culture is viewed as a contextual variable. Different cultures are more inclined to display culture-specific disparities in brand personality (Sung and Tinkham, 2005). According to Kim et al. (2004), eastern culture tends to prefer relationship building and maintaining connections, while westerners prefer differentiation and uniqueness. Therefore, in collectivist cultures, brand-personality congruence will play a much bigger role, whereas in individualistic cultures, differentiated product features will be considered more important (Sung et al., 2012).

H4a: In collectivist cultures, brand-personality congruence has a higher appeal than product features in terms of consumer’s preference.

H4b: In individualistic cultures, brand-personality congruence has a lower appeal than product features in terms of consumer’s preference.

Research Methodology

A questionnaire was developed and administered to university students in six countries – India, Japan, Malaysia, USA, Canada, and UK. While the first three countries are dominated by collectivist cultures, the next three are dominated by individualistic cultures. Respondents voluntarily responded to the survey link posted on the internet by their professors. Of 521 responses received, 12 were incomplete, resulting in a total of 509 acceptable responses. The sample consists of 265 (52%) male students and 244 (48%) female students, so the gender distribution is quite balanced. Their age varied from 18 to 41 years with an average of approximately 24 years. Furthermore, 90 (18%) are Indian; 82 (16%) are Japanese; 72 (14%) are Malaysian; 102 (20%) are American; 87 (17%) are Canadian; and 76 (15%) are from UK. As a result, the data is distributed quite evenly regarding the respondents’ nationality.

The study used four flagship smartphones as stimuli, namely iPhone 6, Samsung Galaxy Note 4, Blackberry Passport, and HTC One M8. They were selected because of two reasons. First, they are among the flagship smartphones that were introduced during the time of the study; therefore, survey respondents would be easily aware of their features and personalities. Moreover, these four smartphones belong to four most well-known brands which have had a long-held history of producing smartphones that outperformed the market. Second, to eradicate the effect of price on consumer purchasing decision, these four smartphones were chosen as they were in the same price range in each of the six countries.

The survey included thirteen questions across three measurements: brand-personality congruence, product feature evaluation, and consumer preference. Each of these measurements is discussed below:

Brand-Personality Congruence. This measurement was computed by asking respondents to evaluate his/her chosen smartphone by ‘considering it as a human’. Three items were used to assess the measurement (Govers and Schoormans 2005). The reliability, as measured by Cronbach alpha for this scale was 0.87, which satisfies the reliability test (Field, 2009). Brand-personality congruence measurement is illustrated in Table 1.

Product Feature Evaluation. This measurement was calculated by asking the respondents to evaluate product features of technology and design. The Cronbach alpha was 0.91, achieving a very high level of reliability (Field, 2009). Product feature evaluation measurements are illustrated in Table 2.

Consumer’s Preference. This was measured by asking the respondents to evaluate the likelihood of purchase after considering the match between their personality and the brand as well as their satisfaction towards the features (Govers and Schoormans 2005). The Cronbach alpha reliability test was 0.92, which is considered to be strong (Field, 2009). Consumer’s preference measurement is illustrated in Table 3.
Findings

In order to validate our hypotheses, a multiple regression model was applied with consumer’s preference as the dependent variable, and brand personality congruence and product feature as independent variables. The model and beta coefficients were all significant, and are given below:

\[ \text{Consumer Preference} = 0.438 + 0.316 (\text{B-P Cong}) + 0.291 (\text{Prod Features}) \]

Overall, the analysis indicates that both brand-personality congruence and product features have a positive impact on consumer buying behavior, with brand-personality congruence having a slight edge. Thus, H1, H2, and H3 were confirmed.

As discussed in the hypotheses 4a and 4b, culture could influence the effect of both brand-personality congruence and product features on consumer’s preference. We divided the data into two sets – collectivist cultures (India, Japan, and Malaysia) and individualistic cultures (USA, Canada, and UK), and analyzed the multiple regression model for each sub-set. All beta coefficients were significant. The findings are below:

For collectivist cultures:
\[ \text{Consumer Preference (C)} = 0.356 + 0.488 (\text{B-P Cong}) + 0.179 (\text{Prod Features}) \]

For individualistic cultures:
\[ \text{Consumer Preference (I)} = 0.209 + 0.241 (\text{B-P Cong}) + 0.298 (\text{Prod Features}) \]

The results indicate that in collectivist cultures, brand-personality congruence has a stronger impact than product feature on consumer’s preference, thus confirming H 4a. Furthermore in individualist cultures, product features have a slightly stronger impact than brand-product congruence on consumer’s preference, thus confirming H 4b. We can see that culture indeed influences the relationship between brand-personality congruence as well as product features on consumer’s preferences.

Managerial Implication and Conclusion

The purpose of this study was to determine whether brand-personality congruence and product features have a significant impact on consumer’s preference in the smartphone industry, and if yes, whether brand-personality congruence has a stronger influence on consumer’s preference than product features such as technology and design. In addition, the research also investigated whether culture could influence these two relationships.

Brand-personality congruence and product features have positively influenced consumer’s preference, with the former receiving a slight edge. However, the more interesting finding is that in collectivist cultures (such as India, Japan, and Malaysia), consumer preferences are driven more by brand-personality congruence, whereas in individualistic cultures (such as USA, Canada, and UK), product features are considered more important.

In conclusion, creating and maintaining brand personality is a significant strategy to sustain a strong, favorable, and unique brand in the consumer’s mind. Furthermore, even though brand personality makes the brand distinctive, the congruence between brand personality and consumer’s personality creates an even stronger relationship between the consumers and the company. In other words, it is believed that brand image could initially attract new consumers; however, it is brand-personality congruence that persuades consumers to stick to the brand and spend even more during their lifetime loyalty. While the brand-personality congruence could be spotlighted in collectivist cultures, the product features such as technology and design seem to be more important in individualistic cultures. Thus, in USA, Canada, and UK, brand managers should allocate more of their resources to communicate the superiority of product features compared to brand personality to successfully convince their target customers, whereas brand managers in India, Japan, and Malaysia should pay attention to building and communicating brand personality, especially to the consumers who share similar personality with that of the brand.
References


Blackberry (2014) Blackberry Passport Commercial. Available from: https://www.youtube.com/watch?v=XnzLBn0TzBg


Table 1. Cronbach Alpha score of Brand-Personality Congruence

<table>
<thead>
<tr>
<th>Items</th>
<th>Average Cronbach Alpha</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand-Personality Congruence</td>
<td></td>
</tr>
<tr>
<td>The X brand is like me.</td>
<td>0.8732</td>
</tr>
<tr>
<td>I identify myself with my description of the X brand.</td>
<td></td>
</tr>
<tr>
<td>If I consider my personality and compare it to the description</td>
<td></td>
</tr>
<tr>
<td>I just provided, I feel that the X brand’s personality is similar to mine.</td>
<td></td>
</tr>
</tbody>
</table>

Table 2. Cronbach Alpha score of Product Feature Evaluation

<table>
<thead>
<tr>
<th>Items</th>
<th>Average Cronbach Alpha</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Features</td>
<td>0.911</td>
</tr>
<tr>
<td>X’s camera is outstanding. (technology)</td>
<td></td>
</tr>
<tr>
<td>X’s battery lasts long. (technology)</td>
<td></td>
</tr>
<tr>
<td>X’s processor is strong. (technology)</td>
<td></td>
</tr>
<tr>
<td>X’s design is easy to use.</td>
<td></td>
</tr>
</tbody>
</table>

Table 3. Cronbach Alpha score of Consumer's Preference

<table>
<thead>
<tr>
<th>Items</th>
<th>Average Cronbach Alpha</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumer’s Preference</td>
<td>0.924</td>
</tr>
<tr>
<td>I think X is a good choice.</td>
<td></td>
</tr>
<tr>
<td>I would like to have X.</td>
<td></td>
</tr>
<tr>
<td>I think X is attractive for me.</td>
<td></td>
</tr>
</tbody>
</table>
Zoot Suits and Racial Hysteria: The Sleepy Lagoon Defense Committee and Wartime Rhetoric

Shirli Brautbar
Nevada State College

Did you ever make a castle out of sand or mud when you were a very small girl in pigtails and took much pains and trouble to erect it and all of a sudden a bigger kid came over and destroyed it for you? Well my feelings are somewhat similar? It seems like the whole world just folded up on me, and there is nothing I can do about it

-Letter From Henry Leyvas to Alice McGrath after being sentenced to life in prison.¹

After receiving a sentence of life in prison for the murder of José Díaz in the so-called Sleepy Lagoon trial that falsely convicted 17 young men of murder based on discrimination against Hispanic Zoot Suiters, Henry Leyvas penned the above letter to Sleepy Lagoon Defense Committee activist Alice McGrath. The Sleepy Lagoon trial resulted from the criminal inquiry into the murder of Díaz, who had died from a skull fracture allegedly as a result of a gang-related incident, on August 2, 1942. In January 1943, after a trial marked by the prosecution's discriminatory eugenicist evidence and media attacks on Zoot suiters of Hispanic origin, the jury convicted seventeen young men of Mexican heritage. In response to this conviction, a group of labor activists, union organizers, community activists, and Hollywood intellectuals came together to form the Sleepy Lagoon Defense Committee (SLDC). Together these activists successfully overturned the convictions by waging a well-organized publicity campaign and legal appeal. In addition to appealing the case, the SLDC strove to counter the anti-Mexican racism that had permeated the first trial. In particular, they challenged anti-Mexican discriminatory practices that had a long-established history in the city of Los Angeles, but in doing so they regularly used masculinist rhetoric which often excluded women from the debate and which steered the main thrust of the SLDC efforts toward defending men.

The SLDC, in its publicity, relied primarily on masculinist wartime slogans and language. Consequently, Latina victims, who were also targets of the Sleepy Lagoon hysteria in terms of lengthy terms of juvenile detention and media prejudice, were absent from the organization’s public discourse on race, which led to negative consequences for Mexican American women. Newspapers depicted “girl Zoot suiters” in the wake of the case as criminal deviants, some girls were arrested and then released, some were pressured to provide testimony against their friends and three were sent to Juvenile detention centers.²

Several problematic issues have to be addressed in relation to the erasure of these women from the dominant historical narratives of the Sleepy Lagoon case. The first relates to the almost complete absence of these women from the historiography until recently. This may be the result of pure ignorance on the part of historians. However, the question remains: why did the SLDC choose to so fully ignore the plight of these young women? Was it just a matter of practical considerations? The contention that the SLDC "simply did not have the resources" to defend the women is questionable considering the SLDC's enormously successful publicity campaigns. The argument, that those involved had little interest in the women's defense, seems more plausible.³ When appealing the case, the SLDC strove to eradicate racial discrimination against Mexicans in the U.S. However, the way they constructed that appeal drew on masculine-oriented ideological concepts which served to erase women from the discourses on race, war, and labor.
The Sleepy Lagoon Defense Committee (SLDC) emerged out of the Citizens Committee for the Defense of Mexican American Youth (CCDMAY), the group focused its energies primarily on the release of the 17 convicted "boys." However, the members of the SLDC envisioned its mission as simultaneously helping to free the seventeen and to eradicate racism. Michael Denning’s *The Cultural Front* provides a useful framework for understanding the political leanings and language adopted by the SLDC. Denning locates the SLDC as a central player in the California Popular Front. He describes the Popular Front as a social movement that emerged in the 1930s, fueled by CIO labor militancy and intellectual Leftism.

Chicano historians reclaimed both the Sleepy Lagoon and the zoot-suiters in the 1970s as part of the newfound Chicano movement. However, only in recent works have historians of the Sleepy Lagoon trial, Zoot Suit Riots, and Chicano history begun to tell the story of women zoot suiters, or Pachucas. Although the masculine countercultural figure of the Mexican male zoot-suit, or Pachuco, captured the imagination of not only historians and academics but of artists, novelists and poets who have depicted this epoch, the reality is that several young women witnesses in the Sleepy Lagoon Trial had been detained in the juvenile court system. However the SLDC did little to address the plight of these young women nor did the publicity associated with the case provide positive images and stories about Latinas. The focus on overturning the young men’s convictions led to an emphasis only on fighting discrimination against Mexican American men and boys which often neglected the plights of women.

Historians champion the activism of SLDC leader Carey McWilliams and the SLDC itself as representative of a “by-gone” leftist cultural moment in United States history: the Popular Front. More recently, scholars such as Eduardo Pagán, Elizabeth Escobedo, and Catherine Ramírez have sought to more fully explore the working-class Mexican American youth culture of the 1940s (referred to as Pachuco and Pachuca culture or sometime as Mexican American Zoot-Suiters) by reexamining both the Sleepy Lagoon case and Pachuco culture. Pachuco/a culture in Los Angeles, which sprung up mainly within Chicano/a communities, combined elements of African American, Anglo American, and Mexican American socio-cultural expressions. Although historians argue about the exact origins of the zoot suit and its adoption, it seems to have originally appeared on the scene in Harlem during the 1930s among working-class African American youths involved in nightclub and jazz culture. Adopted and sold by local tailors, this form of dress eventually spread across the country and was popularized by musicians and actors. Malcolm X famously donned a zoot suit and reflected in his autobiography that he was first introduced to the style in nightclubs.

This cultural phenomenon emerged within the Mexican American community in Los Angeles, and, as Peiss argues, “[t]hose who wore the full zoot suit ensemble embraced identity as Pachucos, combing their long hair in a ‘duck bill’ style, speaking a hybrid slang called Calo, and organizing their everyday lives around social clubs and peer groups.” Although some of the Pachucos were associated with Mexican-American gangs, many others adopted the style of dress simply as a form of cultural expression. Women also participated in this culture as Pachucas in contrasting ways. Catherine Ramírez argues that these women zoot-suiters donned these robes for a variety of reasons which could both embrace and challenge perceived gender roles. Pachuca identity could act as potent signifier of dangerous gender roles, a sometimes Queer expression, and sub-cultural marker.

While Pachuco culture expressed forms of masculinity that could be adopted by young men and women, the SLDC utilized other notions of masculinity for its defense work. The organization instead looked to two institutionalized and related forms of "hegemonic" masculinity that have been rooted in modern Western history: heroic war images and fraternal working-class labor constructs.

LaRue McCormick, social activist and executive director of the International Labor Defense (ILD), monitored the case from the beginning. “McCormick quickly organized a news conference to publicize the case. She subsequently formed an ad hoc committee of the ILD called the Citizens’ Committee for the Defense of Mexican-American Youth. The ILD also sent out over 200 telegrams asking for support.” Historians disagree as to the originator of the SLDC. Some argue that Josefina Fierro de Bright, the leader of El Congreso de Pueblos de Hablan Española, formed the SLDC. Others, such as Frank Baraja, based
on analysis of the testimony of Alice Greenfield McGrath and on some historical inconsistencies, claim that the CCDMAY and the SLDC are mistakenly conflated, that “the CCDMAY existed primarily during the trial, whereas the SLDC worked to finance the appeal to the Second District Court. These points are significant for several reasons. First, they highlight two distinct phases of the Sleepy Lagoon case: the trial and the appeal. Second, each phase illustrates the shifting roles of people involved within and outside these committees. Although historians may never be able to uncover all details of the events or how these groups came to fruition with total accuracy, it appears that a complex interplay between different community players took place. Also, interestingly, women played a significant role in both the formation of the SLDC and its everyday operations, while it appears that men controlled much of the messaging of the SLDC after the group solidified.

Figures such as labor activist Carey McWilliams and Hollywood director Orson Welles contributed to the Popular Front and both played important roles in the SLDC. While McWilliams chaired the committee, Welles supported the SLDC’s work along with his associates from the Mercury Theater, including his wife, Rita Hayworth. Major activists in the SLDC included labor-activist Alice Greenfield McGrath, the editor of Appeal News and the designated liaison between the accused men and the committee. The SLDC also had strong union support, in particular from the CIO, which adopted the Sleepy Lagoon fight into their publicity and conferences. The SLDC campaign reached a wide audience through such novels as the Sleepy Lagoon Mystery by Guy Endore (published in 1944), exposure in CIO publications, contact with various religious and community organizations, radio broadcasts, pamphlets, petitions, and newspaper coverage. The SLDC incorporated all of Denning's definitions of Popular Front politics in its stress on anti-fascism, labor activism, democratic principles, and anti-discrimination policies.

Guy Endore in his description of the formation of the SLDC spoke in masculinist terms. He told radio personality Al Jarvis in a radio program in 1944 if you were the “average man” living in Los Angeles you had probably heard about the trial and assumed the gang members deserved it. Men who had attended the actual trial, he argued, had not been swayed by the “hysterical news coverage.” Rather they had spoken to the boys and their families and seen the racism first hand. The boys’ only crime, according to Endore, was that of being of Mexican background.” Endore, importantly, only speaks about the “boys” and leaves out the girls who were incarcerated. He refers to the public listening as “men” and only speaks about the male activists in the SLDC.

The police initially investigated ten young women who appeared to be of Spanish descent. Among the women, Dora Barrios, Frances Silva, and Lorena Encinas were initially held as murder suspects. Women who failed to cooperate with the prosecution and testify against the inmates were threatened. Women rounded up in connection with the investigation were considered guilty in the court of public opinion and many were given trumped up charges through the juvenile court system and placed in juvenile facilities such as the notorious Ventura School for Girls.

The Sleepy Lagoon Defense Committee had full knowledge of these young women's plight and did nothing. In an interview later in life, Alice McGrath of the SLDC regretted the fate of these women. She explained that the young women witnesses had been detained at the time of the trial:

A year later they were still held in Juvenile hall, and for them there was no hope for an appeal. Zealous social workers trying to rescue these young women from the baneful effects of gang life found ways of extending their detention and some were even declared wards of the state.

Some Historians argue that although committee members had knowledge of this situation they "simply did not have the resources to fight for their release, nor was there any interest among the wider progressive community in doing so." Race and gender played a central role in every facet of America's participation in World War II. Thousands of African Americans and Mexican Americans joined the armed forces hoping to serve their country yet still experienced institutionalized racial discrimination. African Americans served in
segregated sections of the armed forces and, for the most part, as a pool of labor supporting the fighting 
brigades. Over 300,000 Mexican Americans served in combat units during World War II. Although 
Mexican Americans tended—proportionate to the population—to receive the most medals of Honor, they 
had difficulty rising in the military ranks, allegedly due to lack of education. However, Mexican 
Americans experienced harsh discrimination on the “homefront.” The events of the Sleepy Lagoon trial 
and the subsequent Zoot Suit Riots in Los Angeles in May and June 1943 (where Anglo military soldiers 
humiliated and attacked Mexican youth dressed in the period’s zoot suit) are often seen as a manifestation 
of heightened wartime racism. The initial confrontations that led up to the Zoot Suit Riots often 
centered on "quarrels over girlfriends." 

The zoot suit itself came under suspicion during World War II and was restricted according to an 
article published in Newsweek after the Zoot Suit Riots:

The War Production Board virtually banned it in March 1942, when it restricted the amount of 
material to be used in men's clothes, but the zoot suit has continued to thrive—mainly through the 
diligence of bootleg tailors.

The article further explains the relationship of the Zoot Suits riots and Sleepy Lagoon trials to the federal 
crackdown on fashion.

As one result of the Los Angeles outbreak, the Federal government cracked down on this illicit 
trading in zoot suits. The War Frauds Division got an injunction forbidding one shop to sell any 
of the 800 zoot suits in stock. Claiming that the shopkeeper had contributed to "hoodlumism," 
agents said they had found that great numbers of zoot coats and pants were being made in New 
York and Chicago.

In June 1943 the Citizens Committee for the Defense of Mexican American Youth released a press 
release arguing that both the Zoot Suit Riots and the original Sleepy Lagoon verdict played into the hands 
of Axis sympathizers who hoped to sway opinions in Latin America. According to the release, the 
committee stood against the violence of the Zoot Suit Riots and argued that the "incitement for such 
action comes directly from newspapers which in the last few days have run rampant in their headlines, 
stories and editorials. It is because of such a similar hysteria that 17 Mexican-American boys were convicted in 
a Los Angeles courtroom filled with prejudice and hatred, six months ago." The press release goes on to 
lay out a possible conspiracy stemming from:

- a well thought-out Axis plan, carried out most successfully by Axis agents in our midst. We 
  believe that we owe it first of all to our Nation now locked in a death struggle against Hitlerism to 
  get to the bottom of this outrage and to root out the rats gnawing at our vitals. In the name of our 
  Good Neighbor Policy, we must get to the source of this outbreak. Our Latin-American neighbors 
  will seriously question our integrity when they learn that we mistreat and terrorize our 
  minorities.

The committee called upon political officials to punish those that engage in treason and pleaded, “If we 
are to win the war and the peace for democracy, we must unite now in a concerted effort to rid ourselves 
of the Hitler plague on the home front.” The SLDC would utilize similar language.

The war rhetoric can be seen as a tool utilized by the SLDC to promote a mainstream argument about 
racial justice. Discourse on race was not entirely new, nor was it limited to the wartime situation. 
However, the SLDC saw an opportunity to include mainstream arguments about race espoused by public 
leaders into their publicity. Because the events of the Sleepy Lagoon trial and appeal all happened during 
the war years and the SLDC relied so heavily on war rhetoric, the publicity seems almost frozen in that 
historical wartime moment. After the war ended, the committee’s main arguments seemed outdated. Two 
main strands of thought espoused by the SLDC contained gendered language and concepts. In its 
campaign against racism, the SLDC appealed to mainstream patriotic notions of a wartime "united front".
In doing so, they equated the need to abolish discrimination in the United States with winning the war. Consequently, that implied that when the war ended the need for a "united front" ceased as well. The language of war drew upon a hegemonic image of heroic masculinity.

During period intense wartime hysteria, the SLDC incorporated mainstream war rhetoric into its publicity.\(^29\) The war rhetoric appears consistently in SLDC publications, letters, articles, and notes: anti-fascist language, paranoia about a possible Axis conspiracy threatening alliances with Latin American countries, anti-Hitler and anti-eugenics language, and a democratizing "good neighbor" strategy. These themes had a significant impact on the construction of race and also carried gendered meanings. In the foreword to the SLDC’s published manifesto, Orson Welles describes a young Mexican American man, Pete Vasquez:

> I met him at the induction center. He was ahead of me in the line. He'd been studying the clarinet and it turned out we had mutual friends among Negro Jazz musicians. He'd heard some of my broadcasts on Latin America, and he knew I was interested in what the Los Angeles papers have been calling "The Pachuco Murder."

> "The fellas down in our section—there's nothing bad about them, no more than anywhere else. But things are tough. There's nowhere to go—no place to play games—or nothing—. If the cops catch you on the street after 8 o'clock, usually they run you in—or rough you up, anyway. If you look like a Mexican you just better stay off the street, that's all—. And where can you go? It's real bad. I'm going into the Army, and it's all right with me. I'm glad to be going. Things'll be better in the Army, and I'm glad of the chance to fight. It makes it hard, though, for a lot of our fellas to see things that way. They want to fight for their country, all right—but they want to feel like it's their country."

Why did the committee choose to start its manifesto with a vignette focusing all Mexican American men instead of the just the accused boys? In the midst of wartime fever and during a war against a racist Nazi regime, this story tells us many things. First, we learn that Mexican American men have “nothing” inherently “bad” about them—they merely lack financial resources. According to Orson Welles, Pete Vasquez wants to leave this section of town where Mexicans are harassed by police and join the army. But “it makes it hard though for a lot of fellas to see things that way.” The selection also warns that racial discrimination against Mexicans may keep them from joining the military and helping the war effort because they may not “feel like it is their country.” With the war effort prominent in American minds, aligning Mexican and Mexican American men with the war effort highlighted their patriotism for the United State (“their country”) and role in this national fight. Discrimination against them then worked to blunt war efforts because it made them feel like it wasn’t “their country.” Similarly, in a letter to San Quentin officials, Welles states in his appeal that “the case has importance aside from the boys incriminated—the whole community is undermined. Any attempt at good relations is impaired—as is the importance of unity in the furtherance of the war effort. To allow an injustice like this to stand is to impede the progress of unity.”\(^31\)

The political ideology of anti-fascism in the United States originated as a response to Mussolini's political ascendance in 1922.\(^32\) Hitler's rise to power in 1933 cemented anti-fascistic sentiment in American socialist circles and later in the Communist Party. During World War II, anti-fascism was at the height of its popularity, influencing communist thinkers and left-oriented intellectuals and organizers. The Communist Party rallied around the banner of anti-fascism and reached a mainstream audience that identified with the wartime rhetoric.\(^33\) Ironically, anti-fascist propaganda popularized by the left and the Communist Party in the 1940s bore the seeds of the anti-Communist language that would, in the post-war era, disenfranchise the left in the United States.\(^34\)

Anti-fascist sentiment, according to Denning, served as an organizing principle for the Popular Front and, indeed, the SLDC relied heavily on anti-fascist slogans in its publicity.\(^35\) The anti-fascist rhetoric in the United States equated racism in the United States with fascist forces. Groups identified as discriminatory or xenophobic were equated with fascists.\(^36\) The SLDC similarly argued that a fascist
conspiracy bore responsibility for the Sleepy Lagoon convictions. Here is a statement which typifies
the use of anti-fascist language by the SLDC:

By winning the first round, by sending these innocent victims to prison, the native
fascistic forces succeeded in establishing a bridgehead from which to disrupt American
democracy. We must isolate those who hold this bridgehead and wipe them out.

Much SLDC literature contained elements of this national call to arms against the internal fascist forces. By
publicizing this appeal the SLDC sought not only to free the men but also to expose the problem of racial
discrimination in the United States and to provide other ways of thinking about race. By using the war rhetoric
of fraternal solidarity, the SLDC provided a strong attack on racial discrimination.

The war rhetoric employed by the SLDC also focused on the fear of a possible alliance between Latin
America and the Axis powers. The SLDC argued that the treatment of Mexicans in the United States
affected the delicate geo-political balance of power in relation to Latin America. The committee
claimed that the Sleepy Lagoon verdict provided fuel for anti-American "fifth column" elements. In an
ad placed in the Daily News on Saturday, January 29, 1944, the SLDC appealed to the public to join its
cause:

Many concepts were on trial with those boys—the rights of minorities to equal
justice in our courts—the good neighbor policy—the war—democracy itself. And
democracy lost. Seventeen defendants were found guilty. Seventeen for one!
The day of the conviction, Radio Berlin short waved the good news to all of
Latin America. Since then Radio Berlin has not let Latin America forget.

The main war themes stressed by the committee were clearly delineated in this advertisement. At
stake in this case, and in any discriminatory practices against Mexicans, was the war effort. The appeal of
the Sleepy Lagoon case represented an appeal for the survival of "democracy". Any good, war-fearing
democrat should clearly support the effort, the SLDC argued. One major problem with this type of focus
is that it made the treatment of Mexicans and Mexican Americans conditional on the war effort. The
reason that discrimination should cease was connected to winning the war. The war ended in 1945 and
thus the SLDC's argument to end discrimination in the U.S. lost its defining principle. Also at issue is the
fact that the people needed for this war effort, as we will explore in the next section, are described as men.

All important actors in this internal war were consistently defined as men. As R. W. Connell explains,
the image of the heroic soldier represents one of the most potent images of masculinity: "Violence on the
largest possible scale is the purpose of the military; and no arena has been more important for the
definition of hegemonic masculinity in European/American culture." During World War II, this
hegemonic, masculine-hero imagery circulated in American popular and institutional culture. The
members of the SLDC utilized this wartime masculine-hero rhetoric in order to appeal to a mainstream
audience and provide legitimacy for their arguments. Thus, the SLDC modified existing notions about
masculinity and the war effort in an attempt to bring Mexican American men and boys into that picture of
heroism, but in doing so they left women out.

To counter Axis sentiment, the SLDC argued for a united front. The peoples of Latin America would
be needed for the war effort and Mexicans in the U.S. were needed to serve in the armed forces. The
Latin Americans and Mexican Americans whom the SLDC sought for this united front were men. In this
pamphlet written and published by the SLDC in June of 1943, they appeal to men of different races
almost exclusively:

All through the summer Vice-President Wallace's historic May 8th speech was
reaching deeper into the hearts of Latin American people, awakening in the common man
of the hemisphere a new will to fight for the victory it foretold.

Americans, Englishmen, Russians, Chinese, Latins—men of different races but of the
"same stamp"—were forging a global unity.
The pamphlet further argues that the Sleepy Lagoon case represented an attempt on the part of the Axis powers to disrupt the unity and goodwill among men. Two consequences resulted from this type of language. First, the importance of fighting racial discrimination was contingent upon the war effort. Second, the SLDC defined the participants of the war as "men of different races," thus erasing women from the discourse on race, justice, discrimination, and war.

**Conclusion**

While the work of the SLDC was admirable and groundbreaking on many levels historians should not be afraid to look at the possible negative consequences of their masculinist messages. This is not in any way to denounce their work but to show that history is complicated and gender often is ignored as part of the complex dynamic. I have tried in this paper to complicate the narrative of the Sleepy Lagoon Trial, the SLDC and by extension the Popular Front. I believe it is clear that the SLDC incorporated a masculinist approach in their publicity and in their appeal by using war rhetoric and fraternal labor images. These very dynamics of gender have remained unquestioned or unexamined in much of the literature. Subsequently, the women who were incarcerated in juvenile detention centers were neglected first by the SLDC and second by historians. Further study of these women’s fate and place within the history of Sleepy Lagoon would prove a fruitful area of inquiry.

1 “Radio Script for the Al Jarvis Show with Guest Guy Endore”, September 22, 1944, UCLA Special Collections.
2 Sleepy Lagoon Trial Transcripts, UCLA, Special Collections: PBS Article “People and Events”, Zoot Suit Riots: American Experience:
4 Mauricio Mazon, *The Zoot Suit Riots: The Psychology of Symbolic Annihilation* (Austin: University of Texas Press, 1984), 21 -24: In the beginning of the appeal the age of the defendants ranged from 17 to 22. However, the SLDC consistently refers to them as “boys”. Perhaps the SLDC used the term “boys” to inspire pity in their audience? It is also possible that the term is the result of a form of paternalism. I have chosen to use the word men because it seems more age appropriate.
7 Kathy Peiss *Zoot Suit: The Enigmatic Career of an Extreme Style* (University of Pennsylvania press,

Peiss, 50


Barajas 41


Letter from Carey McWilliams to recipients of Sleepy Lagoon Mystery, not dated, Sleepy Lagoon Defense Committee Papers (herein abbreviated “SLDCP”) box 2, reel 2. UCLA Special Collections.

Endore, Al Jarvis, 1944

Escobedo, 22-23.


Mazon, Zoot.

Meier and Ribera, Mexican, 162.

Suit Newsweek June 21 1943.

Suit Newsweek June 21 1943.


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Orson Welles and Marion Bachrach The Sleepy Lagoon Case : with a forward by Orson Welles 1943.

Orson Welles. “Letter to san Quentin” March 1, 1944. UCLA Special Collections.


Buhle, "Anti-Fascism," 54, 55.


Buhle, "Anti-Fascism," 54, 55.

Later this would play a role in the Zoot Suit Riots. See Mazon, Zoot.

Letter from Carey McWilliams to CIO, April, 17, 1943, SLDCP b. 2, r. 2.


SLDC press release, DEC 1944, SLDCP b. 1, r. 1; Form Letter by Carey McWilliams, undated SLDCP, b. 1, r. 1; Guy Endore, The Sleepy Lagoon Mystery (originally published by the Sleepy Lagoon Defense Committee, 1944. Reprinted in 1972, R and E Research Associates), 9.

SLDC Advertisement, "This is the Story of a Crime" Daily News, Los Angeles, California, Saturday, Jan. 29 1944, SLDCP.

Connell, Masculinities, 213.


10 Peiss, 50.
13 Barajas 41
16 Letter from Carey McWilliams to recipients of *Sleepy Lagoon Mystery*, not dated, Sleepy Lagoon Defense Committee Papers (herein abbreviated “SLDCP”) box 2, reel 2. UCLA Special Collections.
18 Escobedo, 22-23.
23 Mazon, *Zoot*.
25 Suit Newsweek June 21 1943
26 Suit Newsweek June 21 1943.
28 IBID
29 Mazon, *Zoot*
30 Orson Welles and Marion Bachrach *The Sleepy Lagoon Case: with a forward by Orson Welles* 1943.
31 Orson Welles. “Letter to san Quentin” March 1, 1944. UCLA Special Collections.
33 Buhle, "Anti-Fascism," 54, 55.
34 Buhle, "Anti-Fascism," 55.
36 Buhle, "Anti-Fascism," 54, 55.
37 Later this would play a role in the Zoot Suit Riots. See Mazon, *Zoot*.
38 Letter from Carey McWilliams to CIO, April, 17, 1943, SLDCP b. 2, r. 2.
41 SLDC Advertisement, "This is the Story of a Crime" *Daily News*, Los Angeles, California, Saturday, Jan. 29 1944, SLDCP.
Scientific Method of Research in Social and Human Sciences: The Practical Steps

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Introduction
In a real life situation, without research there would never be neither development nor any improvement in our living standards. Empirically, all researches are not scientific in nature. A scientific research is a study that uses the logic of science in its enquiry into or on a problem. Scientific research is built around an attempt to solve a well define problem. Specific research questions to be addressed by this paper are:- (a) What does it mean by scientific-based research? (b) What are the elements of scientific-based research? (c) What are the basic scientific-based research methodologies? (d) What are the dichotomies in the basic scientific-based research methodologies? (e) What are the criteria and procedures involved in the primary data collection exercise for scientific-based research? (f) What criteria would determine which basic scientific-based research methodology to be used by a researcher? The primary methodology used in this paper is purely descriptive of the basic steps involved in a scientific-based research in social and human sciences. This paper serves as guides to students, professors and researchers in social and human sciences that knew very little on how to conduct scientific researches in their knowledge fields. This paper starts by explaining what we mean by scientific method and social sciences; before going on to explain the elements of scientific method of research. The measurement of variables and relationships, including primary data collection techniques, in social and human sciences were covered next. Furthermore, the paper covers the dichotomies between all the scientific methodologies and the criteria for choosing a specific method by an investigator. Finally, the paper concludes by examining the relevance and importance of the scientific method to the social and human sciences.

What is scientific method?
As long as the world continues to exit, there will be problems that need to be solved. Scientific method started in Europe in the seventeenth century (McNabb, 2008). There are two ways or methods of looking or examining or stating social problems. These are the normative and rational statements. The normative statement is not scientific. The characteristics of normative statement are: (a) “value or personal judgment driven;” (b) none testable; and (c) non-replicable. The rational statement on the other hand is scientific because it follows the logics of scientific enquiry in determining the factors responsible for a particular problem of interest. Furthermore, the purpose of a research can be either basic or applied. The basic research aimed at increasing the general theoretical knowledge to a specific topic. Applied research aimed at solving either a practical problem or provides better understanding of the past event with a view to predicting future events (McNabb, 2008). There are three basic scientific-based research methods available to social and human scientists. These are qualitative, quantitative, and mixed methods. The mixed method is just the combination of qualitative and quantitative methods in one research project. The criteria for a scientific enquiry include the following facts. It must be based on theoretical frameworks that are defensible; empirical verification of findings must be employed; broad and general applications of findings must be possible; and the validation of the hypothesis must be done logically. In scientific research method, the researcher’s bias and opinions are expected to be removed or
minimized. This is because the researcher’s conclusions and recommendations on the problem at hand are expected to be “data and facts driven.” Given the above facts, a scientific method can be defined as “any enquiry or investigation that follows the logic of science, use the tools of science, and have data-and-facts-driven conclusions and recommendations.”

**What are social and human science Researches?**

Social and human sciences are the fields of human knowledge that deals with all aspects of the society and human’s continued existence. The social and human sciences disciplines that deal with all aspects of the society and human existence include history, sociology, political science, anthropology, geography, urbanism, economics, psychology, communications, laws, health, and education. Tools of science are used in social and human sciences principally to create a verifiable understanding of social and human problems. However, some social concepts such as democracy and behaviors are very difficult to measure. Also, it is somehow difficult to do “cause and effect” analysis in some social sciences disciplines because some social and human science disciplines hardly employed the use of controlled experiments to test their hypotheses. Thus, this is where qualitative method is very useful. On the whole, social and human science researches are conducted to provide: - (a) answers to practical problems; (b) information for better decision making; (c) theoretical knowledge; (d) improvements to the society; (e) description of event; and (f) explanation to situations (Babbie, 2001; and Neuman, 2000).

**Elements of scientific method of research**

The scientific method of research is to search for cause and effect relationships on the issue at hand. Upon the recognition of a problem, steps would be made to look for all possible solutions to the problem. To do this, science has a set of logical sequence of steps to be followed. The scientific method of research steps can be summarized as follows:

**Step 1:** Identification or recognition of the problem to be investigated scientifically. The problem must be carefully well defined.

**Step 2:** Make observations about the world around you and frame a problem that raises questions of how, what, when, where, which, and why; about the reality of what you have observed. These form the basis of a scientific research topic of interest to you.

**Step 3:** Develop a theoretical framework and formulate a hypothesis

Based on observations, a review of relevant literature on the problem will be carried out with a view to ascertain that the problem had not been solved before. The literature review can provide background information, suggest the research approaches, predicts your results and helps to clarify what each of the terms in the hypothesis will be. Based on the above facts, an inquiry will be launched by formulating a hypothesis that predicts possible solution to the research topic or problem of interest. Thus, a hypothesis is in part a possible solution to the formulated problem. Empirically, a topic or observed problem may have many different hypotheses and solutions. A hypothesis is an untested theory, which is based on a particular problem. Hypothesis is the proposition on the untested body of knowledge and theory. Hypothesis is the basis of scientific research on any observed problem. It is a way of explaining the relationship, of cause and effect, or between the independent and dependent variables. The independent variables are the explainable variables which can be varied by the researcher with intend to see their effects on the dependent variable. The dependent variable is the responding variable to the changes in the independent variables.

**Step 4:** Development and designing of a model and procedure to be followed to investigate the topic or problem of interest. This must be quantifiable before it can be called scientific research.

**Step 5:** Collection of relevant data and modification of the same, if necessary, to suit the research model.

This is where there is a dichotomy in the data collection for qualitative and quantitative methods. While it might be possible to use secondary data for quantitative analysis; but qualitative analysis will in most cases required primary data which are to be collected by surveys, interviews and questionnaire by the researcher.

**Step 6:** Data analysis
Step 7: Analyze and interpret your results
Step 8: Research conclusion.
This involves the acceptance or rejection of the hypothesis. If the hypothesis is accepted, it will become a theory. If the hypothesis is rejected, the researcher can either abandon the investigation or modify his or her hypothesis and re-follows the above steps 3 to 7 again.
Step 9: Dissemination of the research outcomes to the public
Step 10: Research’s replications and further testing.
Empirically, the above scientific steps differ between the social and natural sciences only under hypothesis testing step; because in natural sciences, some researches use controlled experiments while social sciences find it difficult to do controlled experiments. This is not a sign of weakness or inferiority of the social science experiments; because in some natural sciences, controlled experiments are also impossible.

Measuring variables and relationships in social and human sciences

The purpose of this section is to put the knowledge of the scientific method into the reality of the social and human sciences research methodologies.

Step 1: Identification and recognition of problems
Problem recognition is the starting point of a scientific research. Since there are many disciplines in social and human science; it is only logical that there would be many methods of identifying and recognizing researchable problems. In the field of sociology and allied disciplines, researchable inquiry may be started with an observation of an increase in crime or students’ drop out of school or teen pregnancy rates. Then, the observer would want to know: why there were increases in those rates? In economics or business, the inquiry may be prompted by a scenario at which a manager of an organization looks at his company’s quarter reports and found something unusual; and he wants to know the reasons for what he had seen.

Step 2: Development of a theoretical framework and formulate a hypothesis
Empirically, hypothesis is core and foundation of any scientific research. This is because it performs several roles in scientific research. It performs the roles of: guiding, delimiting, interpretative, argumentative, complementing, multiplying and unifying functions (Barros, 2008). These meant that it provides directions to the research during the research procedures; helps to demarcate the research topic; proposes potential solutions the problem being investigated; triggers inferences and channels hypothetical-deductive method of reasoning; fills in gaps in knowledge by proposing provisional explanations; makes it possible to adapt an hypothesis to other research; and unifies already acquired body of knowledge or theory (Barros, 2008). A hypothesis is a logical statement that might help a researcher to have answers to a recognized problem. Given all the above facts, it is very important that hypothesis must be well formulated.

Step 3: Development and designing of a model and procedure
This is a mathematical expression of the hypothesis. Here, a model will be specified with a view to measure the phenomenon being investigated. The most important thing in scientific research is be able to study relationships between the research variables. The relationship will be expressed in a mathematical form. It is this mathematical form that we call a model. Typically, a model has: (a) the dependent and independent variables; and (b) the a priori theoretical expectations about the sign and size of the independent variables. The model will be evaluated based on the theoretical criteria of the variables.

For this paper, let us assume that we are interested in knowing why the quantity demanded of money changes in an economy. After the Classical, Keynesian, and Chicago Schools’ literature on the inquiry had been reviewed; a typical model for this inquiry can take the general form of (Kuforiji, 2002):

\[ M^D = f(Y_P, W_{NH}, I/p*dp/dt, R_{EO}, R_{FS}, R_{M}) \]  

where:
- \( M^D \) = Money demanded in an economy
- \( Y_P \) = Permanent income
- \( W_{NH} \) = Non-human wealth
- \( I/p*dp/dt \) = Expected rate of change in price
The signs and magnitude of the parameters in equation 3.1 can be express in a linear form as:

\[ M^D = b_0 + b_1Y_p + b_2W_{NH} + b_3l/p\cdot dp/dt + b_4R_{EQ} + b_5R_{FS} + b_6R_M + U_t \]  

\[ \text{where:} \]

- \( b_0, b_1, b_2, b_3, b_4, b_5, \text{ and } b_6 = \text{coefficients of the money demand equation} \)
- \( U_t = \text{Stochastic error term} \)

Given the a-priori reasoning and expectations of the coefficients in equation 3.2 and after making the necessary adjustments to the general model due to the feasible data for the research; equation 3.2 would become (Kuforiji, 2002):

\[ \ln M^D = b_0 + b_1\ln PKY_t - b_2\ln WINT_t + b_3\ln CPI_t + b_4\ln RURB_t + U_t \]

\[ \text{where:} \]

- \( M^D = \text{Money demanded in an economy} \)
- \( b_i = \text{Regression coefficients} \)
- \( PKY_t = \text{Per capita gross domestic product in year “}t\text{”} \)
- \( WINT_t = \text{Weighted interest rate in year “}t\text{”} \)
- \( CPI_t = \text{Consumer price index in year “}t\text{”} \)
- \( RURB_t = \text{Rate of urbanization in the country in year “}t\text{”} \)
- \( U_t = \text{Stochastic error term} \)

Thus, equation 3.3 would become the model to validate the hypothesis on hand by the researcher.  

**Step 4: Data collection**

Statistical data is very important in the social sciences and human enquiries. Relevant data will help the researcher to conduct and explain his/her enquiries as well as make to recommendations to the public. Sample must be a representative of the general population being studied. In social and human sciences research, the survey and questionnaire designs must cover the range of potential variables that might impact upon the issue being investigated and human reactions that can affect and shape possible responses. Various types of data can be used by the researcher. These could include: time, cross-section, panel, and engineering data.  

**Step 4, Section 1: Qualitative data collection methodology**

The criteria for a valid primary survey or qualitative data collection are many (Creswell, 2007; Hancock and Algozzine, 2006; and Merriam, 1998) and they include: - (a) The chosen participants should be the focused groups or participants qualified to be experts in the subject matter or area of research being conducted. (b) Participants’ responses must be honest. (c) Appropriate instruments must be used to conduct the survey or gather the data. (d) Random-number generator should be used to choose the participants or interviewees and each potential participant must be invited only once. (e) After participants had been randomly selected; e-mail is the best method of inviting the participants to take part in the research. (f) Once the participant agreed to participate, researcher should e-mail the “informed-consent and participant’s form” to participants for completion, signature and returning to the investigator prior to the interview date. (g) The methods of conducting the interview include by telephone, face-to-face, internet, and audio-recording. The participants should be allowed to use the method he or she is comfortable with. (h) Allow participants to choose the location and setting of the interview. (i) To identify participants by gender; reference participants by masculine and feminine pseudonyms. (j) The legal and ethical requirements for research involving human-subject must be followed and observed. (k) Broad and general in nature or open-ended interviewing questions that emanated from the literature reviewed and theoretical framework must be used. (l) Before leaving the interview session, researcher should debrief the participants principally to prevent misrepresentation and mis-interpretation of the participants’ views. (m) Interviews should be immediately transcribed into an “open-coding system” to
reflect what the researcher “captured” from the interviewees. (n) Researcher must be guided by predetermined interview protocol and rubric of the research.

Step 4, Section 2: Criteria for human subject data collection

All human subject researches must observe a set of research rules. These include (a) participation in the research must be voluntary; (b) participants must not be allowed to go through unnecessary physical or mental suffering; (c) participants cannot take part in a research if death or disability is likely to occur; (d) if injury or death of participants will occur if the experiment continues; it must stop; (e) highly qualified researcher must conduct the experiment; and (f) there must be positive benefit to the society from the results of the research (Nueman, 2000).

Furthermore, human subject researches must have the consent of the experiment participants. The consent form must include: - (a) research abstract; (b) procedural list of what the participants would be subjected to; (c) procedural explanations; (d) participant’s recruitment method; (e) participants’ potential risk list; (f) potential benefits of the research; and (g) confidentiality of information must be provided to the participants.

Ethics is another important issue in human subject research. The set of principles that govern the conduct of the experiment must be provided. Research moral behavior refers to right, good, wrong, and evils in research standards. When a research involves human subject; it is mandatory that the approval of the human subject committee or research ethics committee or both committees are got before the experiments can start.

Step 5: Data analysis

In practice, mixed method of data analysis seems to be very popular. This is the uses of a combination of qualitative and quantitative research methods. The use of the mixed method helps to broaden researcher’s perspective on the problem at hand that is aimed at finding out new results or interpretations which either of the methods had produced or pointed out or had not been pointed out, before (Johnson and Christensen, 2004)

The qualitative method is descriptive and somehow subjective because its data comes through interviews and focus groups. Qualitative analysis approaches are common in history, sociology, anthropology, and other allied fields, using both theoretical and non-theoretical approaches, of:- (a) The functionalist theory approach, which emphasizes the interconnections of social life and the difficulty of affecting only one part of society with a policy. (b) The exchange theory approach, which emphasizes the voluntary exchanges of individuals as reflecting individuals’ choices or individuals’ desires. (c) The conflict theory approach which sees social behavior in terms of conflict and tension among competing groups or classes. (d) The symbolic interaction theory approach, which sees individuals as deriving meaning from the symbols they learn from. (e) Historical method, which emphasizes the historical backgrounds. (f) The case study method, which infers from a previous situation. (g) Comparative and cross-cultural methods, which emphasizes social and cultural development, and patterns based on comparative analysis of a many societies.

The quantitative method is very objective and reliable because researcher uses numerical data to either approve or rejects his or her research hypothesis on a particular issue of concern. Here, the researcher can use single-equation, simultaneous-equation, and step-wise equation techniques.

Step 6: Results of the analysis

If the finding is compatible with the observed data and behaviors, the theory is valid and it will be accepted. If the finding is incompatible with the data and behaviors, the theory is invalid and it will be rejected.

Comparative analysis of the three research methodologies in social and human sciences

In Creswell’s (2003) work, he referred to the quantitative method as scientific method, post positivist research, empirical science and postpositivism. Quantitative method is good for “cause and effect analysis”, testing hypotheses and theories, experimental inquiries, and pre-and post-test analysis. The characteristics of a quantitative research would require that:- (a) structured research instruments are used to collect data; (b) sample data must be true representative of the population data; (c) replicability of the research study must be possible; (d) it must has clearly defined research questions and objectives; (e)
The criteria for choosing which research methodologies in social and human sciences

On the whole, investigators are free to choose any method that best meets their needs, purposes, and audiences as well as the investigator’s personal training and experience. The needs and purposes of the inquiry would depend on the following scenarios. Quantitative method is the best when the aims of the research are to identify best factors that influence specific outcomes and when explaining or testing a theory. Qualitative method is the best when the research is explorative or culturally based in nature, sensitive and emotional in nature, “lived experience” research, and when research want to get inside the “black box” of practice, programs and interventions or advocacy with the research (Padgett, 2012). The mixed method is very good in capturing the best side of the qualitative and quantitative methods. With regards to the investigator’s personal training and experiences; since quantitative method involves some complicated statistical analyses, those who are quantitatively incline would likely choose the quantitative method. Those with flexible minds, reflexivity in their abilities, and multitask or interrelated abilities would likely go for the qualitative method (Padgett, 2012). Those who are very familiar with both qualitative and quantitative methods will choose the mixed method. Furthermore, the type of audience to whom the research is for, would literally determine the research method to be used by the researcher.

Relevance and importance of scientific method of research in social and human sciences

Empirically, the relevance and importance of scientific research in social and human sciences cannot be over emphasized. These include: (a) It helps us to determine the legitimacy of claims that had been made in social and human sciences. (b) It helps us to support policy recommendations made to solve particular problem of interest. (c) It provides better understanding of the problems at hand. (d) It provides the researcher with trends of the problems. (e) It provides the researcher with factors responsible for the problem on hand. (f) It helps us to know the types of actions to be taken to solve a particular problem on hand. (g) It presents results to decision makers. (h) It creates a verifiable understanding of social and human problems. (i) It weeds out social and human views that are not testable. (j) It provides numerical values for the parameters of social relationships and verifying social theories.

Summary and conclusion

This paper has provided some guidance to scholars on scientific researches in the social and human sciences. It provides the steps and logic of scientific researches in social and human sciences. It went further to discuss the relevance and importance of scientific method of research in the social and human sciences. The next level after this paper would be to provide some case studies on the subject matter.

Reference
“Gruesome” Evidence, Biased Decisions, and Rule 403

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Abstract

A large part of any criminal trial is the evidence presented in court, but the decision whether to admit such evidence focuses more on a rational determination of relevance than on a science-based assessment of how that evidence may distort rational thought by generating emotional responses in decision-making. While all the ways evidence influences jurors are not completely known, one thing we do know is that evidence that makes jurors feel disgust or anger tends to make them more punitive toward a defendant. The purpose of this paper is to review the effect that gruesome evidence has and to introduce the current Federal Rules of Evidence that determine what evidence may be presented at trial; specifically Rule 403. The paper concludes with a recommendation for amending the application of this rule based on psychological science.

All evidence presented during a trial influences the decision that a jury ultimately makes about a defendant’s guilt or innocence, as it should. However, certain types of evidence may influence these decisions in large and not unbiased ways. When jurors are presented with evidence that is particularly gruesome, they are likely to experience a visceral, emotionally charged, feeling that leads them to be inappropriately punitive.

The study of emotions and their physiological correlates by psychologists has a long history. Although there have been differences of opinion regarding whether one precedes the other or they occur simultaneously, there is no doubt that emotions and physiological responses are closely related. According to the Schachter-Singer theory, emotions are the result of two components; our physiological responses and our cognitions, or thoughts.

Physiological studies using fMRI have investigated the way in which gruesome evidence affects the perceiver’s brain. In one study (Capestany & Harris, 2014), participants read passages that described crimes manipulated to evoke either weak or strong disgust. Not only did those participants who received the strong disgust materials dole out significantly more punishment, they also showed a decrease in activity in the regions of the brain that are usually active during logical reasoning and moral judgment (Capestany & Harris, 2014).

Dolcos and McCarthy (2006) found similar evidence regarding the response of the brain to evocative material. Their study also utilized fMRI technology to evaluate the role that emotional distractors would have on a working memory task involving face recognition. Participants in their study first were presented with an array of three faces. After these were removed from view, they were presented with an emotional picture (e.g., a mutilation), or a non-emotional picture of someone involved in an everyday activity (e.g., washing dishes). Lastly, they were shown a single face and were asked to determine whether it had been in the original set of three. Participants were able to correctly identify the face as being from the original set 75% of the time when the intervening picture was emotional and 80% of the time when the picture was non-emotional. The emotional pictures were associated with increased activity in “hot” brain regions responsible for emotions (e.g., the amygdala), and reduced activity in the “cold” brain regions responsible for goal-oriented and decision-making behaviors (e.g., the prefrontal cortex) suggesting that the basis on which we make decisions is directly influenced by the nature of the material to which we
have been exposed. These researchers then looked at the fMRI results separately for trials on which correct and incorrect recognitions had been made. As the researchers expected, the decrease in the “cold” regions was largest for those trials on which errors were made (Dolcos & McCarthy, 2006). Other neurological studies have found that during decisions surrounding moral judgments, the emotional rather than the cognitive areas of the brain are more active (Salerno & Bottoms, 2009).

Not only does the gruesomeness of evidence produce different patterns of brain activity, it also translates into differences in punitiveness. Douglas, Lyons, and Ogloff (1997) had participants read a fictitious trial transcript about a man killing his ex-girlfriend by stabbing including ambiguous testimony from 10 witnesses. All participants saw a series of photographs, but the experimental group saw additional photographs including images of the actual homicide scene, and the woman’s mutilated body, in either color or black and white. Participants who received the additional photos were more likely to claim to have been affected by the photos and claimed that the photos highlighted the severity of the crime. The participants who were exposed to the additional, graphic, photos were more than twice as likely to vote for guilty when compared to the control group despite the fact that the participants did not feel their verdicts were prejudiced by the pictures. In a similar study, Bright and Goodman-Delahunty (2006) found that participants who experienced gruesome photographic evidence reported greater emotional responses and were more likely to convict than those who did not view the photographs.

It has been suggested that gruesome evidence exacts its effect through the creation of anger in the viewer. This is turn is associated with an “intuitive prosecutor” mentality which seeks to assign blame for negative actions and punish those who violate societal norms (Goldberg, Lerner, & Tetlock, 1999). Ask and Pina (2011) induced angry moods in some of their participants through exposure to a vignette. Then all of their participants read a scenario about an embezzlement in which the evidence against the protagonist was purposely kept ambiguous. Angry participants rated the protagonist as higher in criminal intent and they were more punitive toward him. One explanation for this finding is that feelings of anger are associated with feelings of certainty which, consistent with the fMRI results, leads people to give less attention to processing arguments and increases reliance on intuition and heuristics (Feigenson, 2015).

During a trial, either civil or criminal, counsel will often seek to keep certain pieces of evidence, specifically gruesome evidence, from being viewed by the jury. The justification for this exclusion is that the evidence adds little to help prove the opponent’s case but has the potential to overwhelm and inflame. These legal challenges all too often fail, as judges find precedent supporting their discretionary judgments or simply eyeball the evidence and conclude it to be non-inflammatory. When confronted with “gruesome” evidence, all too often autopsy photos or images of severe injuries, judges must assess whether there is a risk of unfair prejudice or misleading the jury and then, if the risk is present, “may” exclude the proof. Yet there is no court-dictated workable metric for assessing when either risk is present beyond boilerplate terminology such as whether the “[e]vidence . . . makes a conviction more likely because it provokes an emotional response in the jury or otherwise tends to affect adversely the jury's attitude toward the defendant wholly apart from its judgment as to his guilt or innocence of the crime charged.” (United States v. Watson, 766 F.3d 1219, 1242, (10th Cir. 2014); see also Federal Rule of Evidence Manual § 403, 2015, p.6) The standard tells judges which evidence is improper but has no measurement tool; instead, it is akin to that used to describe when material is obscene, defined by law as material that appeals to the prurient interest, depicts sexual conduct in a patently offensive way, in a work that lacks literary, artistic, social or political value – what one Justice described as an “I know it when I see it” approach to decision-making (Jacobellis v. Ohio, 1964).

So what are the rules of evidence that govern such decisions? Two formal rules of evidence apply. The first, Rule 401, requires that evidence be relevant, i.e., that the “has any tendency to make a fact more or less probable than it would be without the evidence; and...the fact is of consequence in determining the action.” (Federal Rules of Evidence Manual § 401, 2015, p. 6) Said more simply, does this particular item of evidence – in the case of this article, a gruesome photograph or video, have any tendency to help prove a fact at issue in this particular case. The decision here is not whether there are other, less-inflammatory ways to do so or whether the opponent concedes the point, but solely if this item is one way
of proving a fact that is necessary to help decide the case. The gruesome autopsy photo, for example, is relevant as it has a tendency to support a necessary fact – injury or death.

But relevance is the starting point, and Evidence codes provide what is at least a theoretical check on excess, Rule 403. That Rule says that a judge “may” [not must] “exclude relevant evidence if its probative value is substantially outweighed by a danger of…unfair prejudice, confusing the issues, [or] misleading the jury…” But the current reading of this Rule is to treat its power to exclude evidence as one to be used “rarely” (Federal Rules of Evidence Manual § 403, 2015, p. 6) or “sparingly” (United States v. Finestone, 1987).

This approach, coupled with the “I know it when I see it” metric, begets arbitrariness. Evidence of this arbitrariness may be seen by contrasting claims of unfair prejudice in criminal and civil cases (a first step for criminal defense lawyers challenging use of gruesome evidence). The default in criminal cases seems to be that of admissibility, demonstrated in the extreme in the 2015 Aurora, Colorado movie theater shooting trial. There, 226 prosecution witnesses were called over 34 days where the only disputed issue was sanity (NBC News, July 15, 2015). Testimony included a detective describing the interior of Theater 9 as "the kind of thing that nightmares are made of” and an EMT testifying that “he prayed over his friend, Jessica Ghawi [one of the 12 people killed during the shooting].” (The Denver Channel, 2015)

By contrast, in civil cases the plaintiff herself/himself may be excluded as evidence where that person’s physical condition has the potential to arouse the emotions of jurors. “[A] court may exclude the plaintiff or limit [her] presence without denying due process...if her mere presence...would render the jury unable to arrive at an unbiased judgment concerning liability... This is so because, in that situation, the court must balance the plaintiff's due process rights with the defendant's right to an unbiased jury trial.” (Rubert-Torres ex rel. Cintron-Rupert v. Hospital San Pablo, Inc., 205 F.3d 472, 478 (1st Cir. 2000), p. 478). This disparate treatment of cases involving money damages and cases involving liberty or even the loss of life confirms the absence of a uniform, other-than-gut-instinct, metric. It also gives counsel a provocative way to move judges in criminal cases to rethink their preference for admissibility.

In addition to arbitrariness, a second problem is the judicial assumption that exposure to gruesome images in a courtroom in the context of trial will not be upsetting because jurors see such images elsewhere. “[T]oday's society [sic] jurors are routinely exposed to similar materials that are equally if not more gruesome than the photographs admitted here.” (Commonwealth v. Parker, 2012 Pa. Dist. & Cnty. Dec. LEXIS 211, *26 (Pa. County Ct. 2012), p. 26) Statements such as this presume that what some jurors see is actually watched by all and that all are inured to the emotional impact exposure brings. Neither conclusion has hard data to support it.

These factors, arbitrariness and assumed habituation, are additionally troubling because once the evidence has been presented to the jury, it cannot be undone. This cannot be ‘fixed’ or ameliorated by proper judicial instructions to ignore the emotional content of graphic or gruesome evidence. Research has shown that instructions to ignore certain types of information are ineffective at best (Kramer, Kerr, & Carroll, 1990; Lieberman & Arndt, 2000) and, at worst, make the information more salient (Cox & Tanford, 1989) due to an ironic process or rebound effect (Wegner, 1994). Results from a recent study (Edwards & Mottarella, 2014) demonstrate how judges’ admonitions to refrain from basing decisions on emotional and gruesome evidence fail to achieve their goal. Participants read a manuscript based on an actual case in which a husband is accused of murdering his wife by drowning her in the bath tub. The researchers took care to use verbatim public records and the Standard instructions to simulate the actual role of a juror as closely as possible. Some mock-jurors received the Standard pattern jury instructions and some received these instructions with the added admonition that

“This includes biases or prejudice resulting from heightened emotionality experienced throughout review of the evidence... Sometimes, evidence can manipulate jurors’ emotions. If emotional, jurors have less mental energy available to make decisions logically. To keep the defendant’s
Constitutional right to a fair trial, it is very important that you try to limit this emotional influence while evaluating evidence and do not allow your emotions to influence your decision.” (Edwards & Mottarella, 2014, p. 403) After reading the manuscript, participants viewed graphic images, neutral images, or no images at all. Results showed that when shown graphic images the jurors produced the largest number of guilty verdicts and that the presentation of limiting instructions had the effect of increasing conviction rates, despite the finding that over 90% of the participants reported that they could make their decisions fairly. In addition to increasing verdicts of guilty, other researchers have found that mock-jurors exposed to crime scene footage adopt a lower threshold for burden of proof than those not shown the video (Kassin & Garfield, 1991).

These effects may hold true even when limiting instructions are given before the evidence is introduced, although the research in that setting offers mixed results. Much like providing an outline for a chapter prior to it being read, providing the limiting instructions before evidence is presented, could serve the role of defining what constitutes emotional, biasing, information. It is with the goal of investigating this possibility that Cush and Goodman-Delahunt (2006) conducted their study in which mock-jurors received limiting instructions to “consider the photographs in a calm deliberate and dispassionate fashion...you shouldn’t use any emotion” (p. 115) either before or after reading facts about a criminal case of a man convicted of killing his wife. Participants also were exposed to either a gruesome (i. e. of the mutilated woman) or neutral (i. e. of the front door to the home) photograph. Those who saw the gruesome photograph had significantly more compassion for the victim and felt more negatively about the event than those who did not. But those who received pre-exposure instructions responded with less perceived event negativity and with less weight being given to incriminating evidence. In contrast, Thompson and Dennison (2004) found no difference in percent of guilty verdicts for those who did and did not receive limiting graphic-specific judicial instructions, despite the fact that these were included in the judge’s pretrial instructions as well as his summation. Thus, even providing limiting instructions well before the gruesome evidence is encountered may not be sufficient to dampen the biasing effects of such evidence.

In addition to the effect that such evidence has on the fate of the defendant, the impact that the presentation of this evidence has on the jurors must be considered; not only from a decision-making perspective but from physiological and psychological perspectives. Beginning in 1990, data for the Capital Jury Project were collected. This project consisted of in-depth interviews with jurors from across the country who had served on capital trials. The original goal of the project was to gain insight into the experiences of and reactions to serving on these juries (Bowers, 1995). In fact, greater than 60 percent described the experience as emotionally upsetting and a third had subsequent trouble eating and/or sleeping (Antonio, 2008). Others experienced relationship problems, smoked and drank more than they should have, and reported nightmares. While reaction to gruesome evidence was not a primary focus of the project, forty-one jurors reported that evidence shown in court, including photos of victims and crime scenes, were upsetting or shocking. Females reported these negative effects more than did males by a ratio of about 3:1. It was noted that “For many jurors, however, the graphic photographs alone – apart from trial testimony – were enough to affect them emotionally. One male juror from a death case described the impact that photographs of the victim’s body had on him: ‘the picture of her dead, her eyes open. That was another shocking thing too.” (Antonio, 2008, pp. 402-403) These qualitative results are consistent with quantitative, laboratory-based, results showing that mock jurors exposed to graphic evidence of violence in the form of explicit verbal descriptions experience significantly more stress during the reading of a trial transcript than those not exposed to such evidence (Thompson & Dennison, 2004). There are, therefore, reasons to limit the introduction of gruesome and graphic evidence during trial to ensure the fairness of the trial and the well-being of those citizens who perform this very important civic duty.

Is there a methodology to reduce arbitrariness and avoid evidence that “provokes an emotional response in the jury or otherwise tends to affect adversely the jury's attitude toward the defendant wholly apart from its judgment...?” (United States v. Watson, 766 F.3d 1219, 1242, (10th Cir. 2014); see also Federal Rule of Evidence Manual § 403, 2015, p. 6) The suggestion here is to be cognizant of the science
on how judgment is affected (if not impaired) by gruesome evidence, and then use that science in a more rigorous application of Rule 403 balancing.

A Science-Informed 403 Balance

Given the scientific evidence, one might ask why even though the Federal Rules of Evidence leave much to the judge’s discretion, the court would allow such prejudicial evidence to be admitted in court? And, what can counsel do with these scientific findings? They must be pled as a factual predicate but then placed into a legal framework to guide the judge in making the decision of whether to allow the evidence to be used and displayed. Because it is rare that gruesome evidence is the sole means available for proving a particular point, the weighing formula developed by the United States Supreme Court in Old Chief v. United States offers a principled means of determining admissibility.

In Old Chief, the defendant was accused of being a felon – a person with a criminal record – in possession of a firearm. He was also accused of using that firearm during an assault. The problem for Mr. Old Chief was that the felony he was convicted of in the past also was an assault, and Old Chief didn’t want that mentioned for fear that the jury would conclude that, having assaulted someone in the past he was more likely to have done so this time. His attorney wanted the jury told that Old Chief was a felon (and thus ineligible to have a gun), but not a felon who had assaulted before. Recognizing the unfair prejudice in this circumstance, the United States Court agreed, and set forth a Rule 403 “balancing” test:

On objection, the court would decide whether a particular item of evidence raised a danger of unfair prejudice. If it did, the judge would go on to evaluate the degrees of probative value and unfair prejudice not only for the item in question but for any actually available substitutes as well. If an alternative were found to have substantially the same or greater probative value but a lower danger of unfair prejudice, sound judicial discretion would discount the value of the item first offered and exclude it if its discounted probative value were substantially outweighed by unfairly prejudicial risk (Old Chief v. United States, 1997, pp. 182-183).

The problem is that, post Old Chief, courts have limited this step-by-step approach to evidence of a person’s prior record and have not applied such scrutiny to ‘gruesome’ evidence. Given the research confirming the distorting impact of ‘gruesome’ photos or similar evidence, that same scrutiny is needed when such proof is offered.

What would this look like in practice? Where a forensic pathologist needs to describe the point of entry of a bullet that struck a victim’s head, she may do so with a black and white drawing of a head, with a Styrofoam model of a head, or a photo from the autopsy. All three can show, equally, where on the head the bullet entered, so their probative value is equal; but the emotional [read “unfairly prejudicial” or “misleading”] impact of the photo is far greater. Old Chief’s reasoning would follow these two steps (using a 1 to 10 scale). (Note: the “risk of prejudice” values are the authors’ estimates.)

<table>
<thead>
<tr>
<th>Evidence</th>
<th>Drawing</th>
<th>Styrofoam Model</th>
<th>Autopsy Photo</th>
</tr>
</thead>
<tbody>
<tr>
<td>Probative Value</td>
<td>10</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Risk of Prejudice</td>
<td>3-4</td>
<td>3-4</td>
<td>10</td>
</tr>
</tbody>
</table>

Old Chief’s command that the court then “discount the value of the item first offered and exclude it if its discounted probative value were substantially outweighed by unfairly prejudicial risk” would revise the table as follows:

<table>
<thead>
<tr>
<th>Evidence</th>
<th>Drawing</th>
<th>Styrofoam Model</th>
<th>Autopsy Photo</th>
</tr>
</thead>
<tbody>
<tr>
<td>Probative Value</td>
<td>10</td>
<td>10</td>
<td>6-7 [discounted value]</td>
</tr>
<tr>
<td>Risk of Prejudice</td>
<td>3-4</td>
<td>3-4</td>
<td>10</td>
</tr>
</tbody>
</table>

In this formulation, because of the science on how inflammatory evidence distorts judgment, the autopsy photo has a discounted probative value and a high risk of unfair prejudice or misleading the jury, the proof would have to be made by the drawing or the Styrofoam model. Each could tell the story equally well, but neither risks the same emotional response as the autopsy photo.

Put more simply, what this test really does is change the courtroom calculus from ‘let the party tell its story in the manner it prefers’ to ‘do you really need that to tell a rich story and make your case?’ And
where it truly is needed, care should be taken in jury selection to assess which prospective jurors might be overwhelmed by such proof, and in trial presentation to minimize exposure.

The need for this shift in approach is not a mere academic conjecture. It is substantial enough that in the *Woodard* case involving 13 autopsy photos Pennsylvania’s Chief Justice, in dissent, called for greater judicial scrutiny and more exclusion of gruesome evidence. Surveying some of the scientific research, Chief Justice Thomas Saylor wrote that “appeal courts should impose some constraints upon the introduction of graphic photographs into the courtroom…” (*Commonwealth v. Woodard*, 129 A.3d 480, 511 (Pa. 2015), p. 511) Chief Justice Saylor went on to conclude that the medical examiner’s detailed verbal depiction of the injuries was more than sufficient, and concluded that color photographs of a nude, battered, open-eyed, deceased child on a slab, encompassing full body portraits and facial close-ups, should be regarded as inflammatory (or likely to evoke strong emotional reactions, including generating anger). Such graphic, visceral portrayals of a dead child, in my view, create an unacceptable risk of influencing jurors to reach conclusions based on factors other than a strict application of the law to the facts. (*Commonwealth v. Woodard*, 129 A.3d 480, 511 (Pa. 2015), p. 511)

Chief Justice Saylor’s dissent is both an invitation to and a modest blueprint for a new litigation strategy. As to the rejoinder that trials will become sterile recounting of fact, or that juries will leave the courtroom asking “why wasn’t there more proof?”, there is plenty of emotion remaining in the drama of the courtroom, and skilled litigators have or can hone the art of keeping a trial interesting and bringing a rich, textured and comprehensible story to jurors. This can be done without gruesome evidence, and should be achieved with a better metric than ‘I know it when I see it.’

References
Cintron-Rupert v. Hospital San Pablo, Inc., 205 F.3d 472, 478 (1st Cir. 2000)(internal quotations and citation omitted).
Federal Rules of Evidence. 403 (“The court may exclude relevant evidence if its probative value is substantially outweighed by a danger of one or more of the following: unfair prejudice [or] misleading the jury…”).
Jacobellis v. Ohio, 378 U.S. 184, 197, 84 S. Ct. 1676, 1683 (U.S. 1964), Stewart, J., concurring (“I shall not today attempt further to define the kinds of material I understand to be embraced within that shorthand description; and perhaps I could never succeed in intelligibly doing so. But I know it when I see it[.]”)
United States v. Finestone, 816 F.2d 583, 585 (11th Cir. 1987).
Teaching History and Social Science to the Latino Student: It’s Not About Race, It’s About Religion and Self-Reliance

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In 2012, the latest year for which the U.S. Department of Education reports actual, not projected numbers, Hispanic/Latino students were over 12.1 million of the nation’s 49.8 million students in public elementary and secondary schools – more than 24% of the total, the second largest group after “White” (NCES, 2015). Hispanic students were 18% of all students in the Northeast region, 11% in the Midwest, 24% in the South, and 41% in the West. I will use the U.S. Census definition of Hispanic or Latinos as people who classify themselves as belonging to one of the specific Spanish, Hispanic, or Latino categories listed on the Census 2010 questionnaire, with the qualifier that they may be of any race (U.S. Census Bureau, 2015).

But how exactly are Latino students different from other students, and how might understanding these differences improve their learning of history and social science?

You have heard and read the numbers before on the most common indicators of “difference,” or “diversity”: statistics on race and ethnicity, poverty and socioeconomic status, immigrant status, and language background. You are familiar with interpretations and explanations for the statistics, which then turn into implications for and stereotypes about those students: test scores and dropout rates tell us Latino students need to do better in school, they are poor, they grow up in immigrant and Spanish-speaking homes, and they are more likely to attend poor, racially and ethnically segregated schools that offer fewer curricular resources and less experienced teachers. Depending on our political biases, these indicators of difference and diversity are either legitimate explanations or poor excuses for academic underachievement.

I seek to direct attention to a couple of perspectives and questions that can help us understand Latino students and their families better, ones that have not been often considered before. In analyzing various categories of diversity we have ignored two important indicators of how Latino students may be different from other students: individualism and self-reliance, and religion.

Individualism and Self-Reliance

Carrie-Rothstein-Fisch and her collaborators have found that while a predominant feature of U.S. society and culture is a focus on individual achievement, other societies, principally those that send the largest number of immigrants to the U.S., are more collectivistic and group-oriented (Rothstein-Fisch, et.al, 2010).

The idea that American culture is individualistic is not novel. But the idea that most countries that send immigrants to the U.S. represent collectivistic cultures is a different than simply seeing the immigrants as being of a different color, race or ethnicity. Unfortunately the term “collectivistic” is problematic; to the American mind, “collectivistic” begins to sound like socialism and communism. “Group-oriented” is more palatable. Some of my students have also suggested “family-oriented.”

I do not know the definitive answer to the question of whether Latinos are less individualistic and self-reliant than other Americans, or more group- or family-oriented than other Americans. Even posing the question makes broad assumptions and generalizations. But the questions are intriguing and open-ended ones that can draw Latino and other students into a deeper study of American history and social science using a lens different than those of color and race.
Table 1 (Individualism and Group orientation) lays out some basic differences between the two types of societies, individualist and collectivist, on two general dimensions, according to Rothstein-Fisch and her collaborators: the preference for working alone or with others, and the importance placed on academic achievement. My general claim based on their work is that Latino students are generally raised in a culture that emphasizes group identity and interdependence, and while the students and their families value doing well in school, other values are more important.

What Does This Look Like At Home?

In the home, in an individualistic, self-reliant culture, the individuals is raised to become as independent as possible, and to depend on self-discipline to survive. The following is anecdotal evidence based on personal and professional experiences, attending integrated schools and universities, and working in integrated settings. When he is a child, the American individual learns to be in the care of well-qualified “strangers” other than parents and family members, such as nannies, au pairs, babysitters, and Boy Scout troop leaders. He learns to sleep alone in his own room very early, and do sleepovers in the houses of non-family members. He learns to be dropped off and picked up at parties, sports, and other events without his parents needing to be with him at all times. In elementary school, he learns to walk himself to and from school. When his parents have the means, he learns to be away from his parents at summer day and overnight camps, and for the wealthy, boarding schools are a viable option. When he grows up he graduates from high school and moves on to further schooling, or enters the job market with little to tether him physically to the home in which we was raised. The individual so raised, especially the physically dominant male, learns to be happiest when he is alone, on his own, being his own man, owning his own business or setting his own rules at work, master of his own fate and destiny, enjoying his liberty and freedom, at work or play, not having to rely or depend on anyone. Maybe he is with his family or friends, but he does not have to be. He feels little obligation to take care of his parents when they grow old, and this is not a problem – his parents are as self-reliant as they raised him to be.

Child-rearing practices are different in many Latino homes, ones in which the values of independence and self-reliance count less. Again, based on personal background and experience, and anecdotally from friends, family and acquaintances, I have found the following. Many Latino children have only family members as occasional babysitters, sleep in the same bed or room as their parents for months and even years, and avoid sleepovers at the houses of non-family members. Parents take them to parties, sports, and other events, but stay with them much of the time. In elementary school, they are dropped off and picked up at school by their parents who either walk with them or drive them. Summer day and overnight camps, and boarding schools, are out of the question, and not just because they are expensive, but because they mean time away from one’s parents. Many adolescents in large families are responsible for helping raise younger children. Throughout adulthood many Latinos stay at home until they get married, remain close to home after marriage, see and talk to their parents frequently if not daily, rely on their parents for care of the grandchildren, and take care of their own parents in their old age. These are burdens, but they are seen as obligations, and experienced as reciprocal and grateful acts of love.

For most Latinos, being with family and friends, in constant and good communication with all, being and feeling responsible to their families and communities, is what makes them happiest and self-fulfilled. It means depending on the assistance and support of family in almost every aspect of our lives, and in return helping that family. In an individualistic, self-reliant culture, this dependency can be seen as weakness and excessive meddling, but for Latinos, the interdependency, the communication and the support is what makes us strong.

These, of course, are broad generalizations with multiple exceptions. We Latinos have our fair share of loners, independent thinkers and self-reliant doers. Immigrants who survive in the U.S. without their parents are very self-reliant. Lots of middle-class, college-educated Latinos allow their children to do sleepovers, and go to day and overnight camps. Some families send their children to boarding schools. The comic Paul Rodriguez has joked that Latinos do not send their elderly to retirement homes, but only because the homes are so expensive. But as general tendencies, it is fair to characterize Latinos as more group-oriented than the individualistic ethic of the U.S., and more interdependent with family and friends than strictly “self-reliant.”
The Religious Foundation of Individuality and Self-Reliance

When I first came across the work of my colleague and her collaborators on individualism vs. collectivism, I linked it to another reading by asking a historical question. If the Rothstein-Fisch team is right, how did these different ways of being and looking at others originate and develop in American history?

The second reading was a 1979 essay by Mexican philosopher and poet Octavio Paz. He wrote that the most significant difference between the U.S. and Mexico was not about race or ethnicity, or income and class, but that the U.S. was a Christian Protestant nation with no significant indigenous identity - the culture and influence of the American Indian having been almost completely destroyed - while Mexico was a Roman Catholic nation centered on an indigenous history and identity. Paz argued that Mexican Catholicism, a combination of Spanish and indigenous traditions, had different approaches than European Protestantism toward human relations, work, economics, government, law, democracy, freedom of thought, and education. For Paz, the Puritans set many of these differences in motion in American history.

This suggestion has led me to look for differences among Latinos and other Americans, not in their skin color, race, ethnicity, socioeconomic status, language, or immigrant status, but in their religious histories. I have come to see that while Hispanic/Latino persons have historically been perceived as “brown” people in a country of mostly “white” people, or poor people in a wealthy country, or Spanish-speakers in an English-speaking country, or immigrants among a native-born population, an often ignored dimension is that many of them are descendants of Latin American Catholicism in a predominantly Protestant Christian country. But before we explore what this might mean, we need to see some numbers.

A Religious Snapshot of America

If we depart from thinking of the country in terms of race and ethnicity, and think about it in terms of faith and religion, what do we see? While the U.S. Census Bureau collected data on religious affiliation and religious organization from 1906 to 1946, since 1976, Public Law 94-521 has prohibited the Bureau from collecting data on religious affiliation through demographic surveys or decennial census on a mandatory basis (U.S. Census Bureau, 2015).

For a number of years the Pew Charitable Trusts, a think tank headquartered in Washington, D.C., has conducted the U.S. Religious Landscape Survey (Pew Charitable Trusts, 2008). By surveying over 35 thousand Americans over the age of 18, the 2008 Survey found the following:

• The U.S. is on the verge of becoming a minority Protestant country; the number of Americans who report that they are members of Protestant denominations now stands at a little over 51%, and about 24% report they are Catholic.
• The Protestant population is characterized by significant internal diversity and fragmentation, encompassing hundreds of different denominations loosely grouped around three fairly distinct religious traditions: evangelical Protestant churches (26.3% of the overall adult population), mainline Protestant churches (18.1%), and historically black Protestant churches (6.9%).
• 16.1% of Americans say they are unaffiliated with any particular faith.
• More than one-quarter of American adults (28%) have left the faith in which they were raised in favor of another religion - or no religion at all.

So, as a quick snapshot, it appears that of every 4 Americans, approximately 2 are Protestant Christian, 1 is Catholic, and 1 is other or unaffiliated.

But among Hispanics and Latinos, more are Roman Catholic, though the numbers are declining (Pew Research Center, 2015).

• A majority (55%) of the nation’s estimated 35.4 million Latino adults identify as a Catholic.
• About 22% of Latinos are Protestant (including 16% who describe themselves as born-again or evangelical).
• 18% of Latinos are religiously unaffiliated.

It is true that rising numbers of Hispanics are Protestant or unaffiliated with any religion. Back in 2010, polling by the Pew Research Center found that 67% of Latinos were Catholics. The Pew surveys
now indicate that nearly one-in-four Hispanic adults (24%) are former Catholics, and the trend seems to be a religious polarization within the Hispanic community, with the shrinking majority of Hispanic Catholics holding the middle ground between two growing groups, evangelical Protestants and the unaffiliated. Still, the religious fluidity of American society is not going to erase the cultural legacies of 523 years of the predominantly Roman Catholic history of Latin America, since Columbus sailed the ocean blue in 1492. Neither is it going to erase the cultural legacy of 395 years of Christian Protestantism in the U.S. since the arrival of the Puritans.

**Is Protestantism more an individual than a collective experience?**

Octavio Paz’ work made me take another look at the Puritans I thought I had learned about in elementary school, and the larger history of English and Western European Protestantism of which they were a part. I think it is possible to see some of origins of American conceptions of individualism, freedom and liberty, in the experience of the principal founder of Protestantism. Martin Luther broke from his father and went against his wishes to join a monastery. At the age of 22, for some reason believing “his soul was destined to spend an eternity in hell,” he swore the oath to achieve his personal salvation, both spiritual and physical (Epphimer, 2010). He showed great spiritual and intellectual courage and independence in challenging, seemingly all by himself, a corrupt and intellectually stagnant Catholic Church, principally regarding the sale of indulgences. His doctrine of “sola scriptura” required a believer to have a personal, individual relationship to God and the Bible, without the intercession of priests, bishops and a pope.

There may be cultural legacies here that we should not ignore, and that can lead to intriguing historical questions. One modern scholar brings to bear a historical and civil rights perspective to make the following assertion:

“…diversity has been growing rapidly among and within America’s religions. The establishment Protestant churches, which so powerfully shaped America’s culture, are in a long-term decline. White Protestant growth has been concentrated in evangelical and Pentecostal churches, which preach a much more fundamentalist and individualist view of the Bible, with less emphasis on public racial justice and other social issues” (Orfield, 1999).

Here I see an ideological and psychological conflict I cannot reconcile, but leads to good questions to pose to draw students into a deeper study of U.S. and world history and other social sciences. Martin Luther’s individuality and independence must have inspired the Puritans as they struggled to purify first the Catholic Church, then the Church of England, and then strive to establish their model church in the Americas (Gaustad and Schmidt, 2002). But did they not also have to work as a collective to survive in the new world? Did not their work require, at some level, “group work” instead of “individual work”? If it did, but the work of Rothstein-Fisch and her collaborators is correct, then at that time in American history, and in the experience of the Pilgrims and later the Puritans, where exactly did the division happen between emphasizing the individual vs. the group? Or is this a case of group work being emphasized, but wholly depending on the definition of the group?

This is where the issue of possible differences in religious history becomes very relevant, especially as a pedagogical hook. Simply posing the questions is a way to get teachers and their students to better engage with the history. Historically, and in our present time, we can look at different religious faiths and ask to what extent they emphasize independence, individuality and self-reliance more, or interdependence and group orientation more.

**So What Does This Mean for Your Work as an Instructor?**

All instructors should ask such questions of their own work, questions that can lead both instructors and students to make connections between their personal background and the history and social science they must teach and learn. These relationships between independence and interdependence, and Protestant Christian and Catholic, can and should lead to improved understandings of religion as an intellectual resource on which teachers can draw to teach history/social science and enrich students’ opportunities to learn the subject.

An individualistic culture, greatly influenced by the Protestant Christian experience in the U.S., places a high value on independent expression, work, and achievement in school. To spur the achievement,
students compete with one another to ultimately determine who wins or who is best. That kind of competition means little to most Latino students, and breeds resentment and disengagement. Managing our teaching and assessment to determine who gets the highest grade on the exam, writes the best essay, delivers the best speech in public, makes the best poster or presentation, or does the best job of reading aloud to the whole class, may not work well for all Latino students.

My view is that emphasizing group work and collaboration works better for Latino students than over-relying on individual work. This is so even though the students may seem to tend to get off task and be too “social.” That’s a problem until you figure out how to use it to your advantage. Latino students want to talk and socialize not because they lack discipline and don’t care about their education, but because they want to constantly interact and talk with other people – that’s how they live and learn at home and in their community. Your mission should be to channel that interest toward learning the lesson at hand, not to get them to be absolutely quiet, open the book, and work on their own. Instead, think more in terms of small group discussions and read-alouds, document evaluation and interpretation in small groups, co-authored essays, group projects and presentations, debates, and skits.

Of course all students should eventually learn to work within the general framework and ethic of the United States – an emphasis on individual identity and work, independence, and self-reliance. But it is important, especially for Latino students, that they realize early that this may be different from their home or ancestral culture. And if you interest them in finding these connections in history and social science, you have added to your toolbox for teaching these fundamental subjects.

References
Table 1: Individualism and Group orientation

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<thead>
<tr>
<th>Value placed on group/collective work and achievement</th>
<th>Individualism and Self-Reliance</th>
<th>Group orientation and Interdependence</th>
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<td>U.S. society and culture – a predominant feature is an emphasis on individualism: individual identity, independence, self-fulfillment, standing out, individual expression, work, performance and achievement, both in school and at home.</td>
<td>Other societies, principally those that send the largest number of immigrants to the U.S., are more collectivistic and group-oriented. These societies emphasize group identity, interdependence, social responsibility, and conformity to group norms.</td>
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<td>Individualistic cultures come to value academic and scientific knowledge highly, “particularly the accumulation of factual knowledge.”</td>
<td>Other cultures come to value social knowledge and intelligence. People in these types of cultures are taught to learn more about people than facts or things, to work with other people and to share their possessions.</td>
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Community College Students’ Self-Reported Potential Career benefits of
taking a social science course online: A Case Study

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Abstract: This case study of community college students examines their self-reported perceptions of potential career benefits by having taken a social science course or a few social science courses online. There is no prior literature on this topic. This case study takes place in the state of Nebraska. This research examines how 110 rural community college students responded to a series of 13 demographic questions and an open-ended question related to perceived career benefits of taking a social science class online. Data were collected for this project from the fall semester of 2014 through the fall semester of 2015, which included the summer semester of 2015. The online social science courses used in this research included the following courses: Introduction to Sociology, Social Problems, and Gerontology. The purpose of this study is to discover whether or not rural community college students at this Midwestern community college see any future career benefits of taking social science courses online, no matter what their proposed field of study may be.

Introduction

Perhaps one of the toughest tasks a community college instructor may endure during his or her career in academia is to get students to “buy-in” to the class he or she is teaching, especially if a student is not interested in taking their course. There are several reasons a student may not want to take a course. He or she may feel it is irrelevant to their course of study. For example, a student who is majoring in welding at a community college may not see the intrinsic value of a social science course as it pertains to their major. However, what that student may not realize is that he or she will be working with people in their everyday lives, and will need certain skills, perhaps soft skills, that could benefit them in their career.

So what is social science? According to www.worldwidelearn.com/online-education (2015) “Social Science studies humanity’s impact on our world. Once considered elements of the humanities, many disciplines like communication, history or anthropology gained their social sciences categorization in the early 20th century. After World War I social science academics challenged themselves to apply statistics and mathematical measurements to areas they previously studied by observation alone. Today’s social science academics analyze how our human behavior creates ripple effects in everything from economics to the environment” (p. 2).

In a recent article from http://www.collegeatlas.org/community-college-benefits.html (June 1, 2015) it is stated “Professors at most community colleges love teaching, consequently, they are able to simplify otherwise complicated subjects in a way that students are better able to understand, internalize, and reapply them in the real world” (p. 2). Oftentimes, however, as a social science educator at a community college, it is still a struggle to get students’ whose majors are outside of the social sciences or life
sciences, to “buy-in” to the content of the curriculum of the class, its value to their future careers, and what you want them to learn from the class you are teaching. Interestingly, recent research suggests that nontraditional students (those aged over 25) in a specific program at a community college appear to be more motivated to learn at a community college (Boyington 2014; Cummins 2014; Nitecki 2011; Stuart et al 2014) than their younger peers. In fact, Boyington (2014) posits “Community colleges are made up of students from a variety of backgrounds, academic histories and ages, and are often more diverse than four-year institutions and more accurately represent the world. That diverse student body at community colleges can help nontraditional students make a smoother transition into a formal learning environment” (p. 2).

This case study attempts to address the research question: “How is taking a social science class online going to benefit you in your future career?” There were 110 respondents in our study. Most of the students felt there was a strong, inherent value to their current or future careers by taking social science classes online; however, not all respondents answered the question and not all of them felt there was any value at all. This case study is the first of its kind related to this topic. It proposes to open the door for future research on this topic, hopefully on a grander scale, and to examine two issues. First, address the issue of student “buy in” for taking social science courses online. Second, for those students who do value taking social science courses online, address the question, “Why do they see value in taking these courses online for their future career?” Below are a few general student responses as to what they felt they would gain from taking a social science course and how it could help them in their future careers.

Student 1: “It helps me have a better understanding of the cultures and way of life of people.” Student 2: “Social Science classes will benefit me in my career because it will give me the opportunity to empathize and reach out to a wider variety of populations.” Student 3: “I think the social sciences greatly affect people’s careers. It helps a person understand where they are in the social hierarchy. There are some people that are poor and rich and have different values when it comes to their beliefs.” Student 4: “This class gives you a better understanding of the world around you. It also gives you a better understanding of how other cultures live. Also, it gives you a better understanding about how other social classes live.”

Demographics
During the 2013-2014 and 2014-2015 academic years, this rural, Midwestern community college served a total of 22,103 students (9,454 were full time or part-time, credit seeking students); 86.9% or 19,212 of those students were in the primary 25 county area this college serves in rural Nebraska (Enrollment Report, Central Community College, 2014-2015). The five most popular majors on campus as of the 2014-2015 academic year were Academic Transfer, Business Administration, Nursing, Early Childhood Education, and Human Services (Enrollment Report, Central Community College, 2014-2015).

College-wide, approximately 61.6% were women and 38.4% of the students were male. Approximately 9,454 were credit-seeking students. College-wide, approximately 77.33% were White Non-Hispanic; 16.35% Hispanic/Latino; 2.09% claimed two or more races; 2% were Black/African American; 1.06% Asian/Pacific Islander; and 0.5% were American Indian/Alaska Native. This college has three primary campuses and several smaller satellite campus sites in the 25 county region of central Nebraska it serves (Enrollment Report, Central Community College, 2014-2015).

Review of Literature
According to a 2015 article from the American Community Colleges Journal, “The beauty of the community college system is that not only does it offer affordable education, when compared to four-year universities, but it also provides a high quality education” (p. 1). There are so many benefits that community college students have over their four-year counterparts. In a recent news article, Boyington (2015), reports the following: “The quality of instruction at many community colleges is on par with the courses taught at four-year universities.” (p. 1). Boyington (2015) also suggests four key benefits for students attending community colleges. First, students can move at their own pace. Second, community colleges can help students address their academic and personal needs. Third, students can start their
education and then transfer to their dream school. Fourth, students can benefit from personalized attention.

Randolph (2014) cites three other key benefits community college students have going for them. First, is the cost of tuition. She states that the average tuition and fees are less than $3,150 per year. Further, half of all community college students hold a part-or full-time job. Second, housing is cheaper because many community colleges don’t have dorms. As a result, many students live at home or rent an apartment. Third, community college students enter the workforce sooner than their four-year counterparts, which means they earn real income sooner due to the focused academics the community colleges provide.

This case study research focuses specifically on community college students seeing value in taking social science courses. Recent research suggests since the student-to-faculty ratio at most community colleges is lower than at most four-year colleges and universities, community college students often spend more time working directly with their professors (www.collegeatlas.org) June 1st, 2015. Further, professors at community colleges utilize teaching methods that focus on teaching rather than research, which may facilitate a more conducive learning environment and experience for students. Professors at most community colleges also love teaching, so it is suggested they are able to simplify complicated subjects in a way that students are better able to understand, internalize and reapply them in the real world (www.collegeatlas.org) June 1st, 2015.

There is no specific literature that addresses our research objective. Our research is exploratory in nature and is meant to be a starting point for addressing the question: “How is taking a social science class online going to benefit you in your future career?”

Method

This is an exploratory case study examining rural community college students’ perceptions of potential career benefits by taking social science classes online. Data for this research were collected from students in the fall semester of 2014 through the fall semester of 2015. Students were administered a 23-item survey instrument in which they were asked to answer 13 demographic questions and then ten open-ended questions. This instrument was only administered to online social science students at the 100 and 200 level.

This instrument asked the students questions such as highest level of education they had completed, area of study, gender, age, race, mother and father’s level of education, mother and father’s occupation, political affiliation, and income. The ten open-ended questions included questions related to attitudes toward taking classes online at this community college, perceptions of level of difficulty of taking social science classes online versus a lecture, benefits of taking a social science class for one’s major, benefits of taking a social science class for one’s career, other online classes students were taking at this community college, other online classes students were taking at other colleges, and whether or not a student ever planned on taking another online class at our community college.

The focus of this study, however, hinges on the question: “How is taking a social science course(s) online going to benefit you in your career?”

Findings

The focus of this case study is to examine a rural community college’s students’ self-reported future career benefits by having taken a social science course(s) online. The primary question for this study is: How is taking a social science course(s) online going to benefit you in your career? There were 110 participants over the course of the calendar year. We broke down the student respondents’ answers into four different categories, which included: Nursing majors, Human Services/Social Work majors, Business Administration majors, and the General Student Population which represented a wide array of majors.

This section will summarize the most common responses provided by the student respondents for three of the most popular majors represented in this research: Nurses (30.0%), Human Services majors (18.2%), and Business Administration majors (12.7%). In the latter part of this section, a summary of comments made by the general student population in this case study who are either Academic Transfer students or in another major will be examined. The way students responded will be typed out exactly as
they responded to the questions. There may be some grammatical errors. Below is how the students responded by major, beginning with nursing students.

**Nurses**

The nursing majors represented the largest number of respondents in this case study. That is most likely due to the fact that it is mandatory for them to take an Introduction to Sociology course as part of their curriculum. In this study, 33 out of the 110 respondents were nursing majors. It must be noted that not one nursing major had a negative comment when discussing how a social science class would benefit them in their future career. In fact, most nursing students discussed the numerous benefits of taking such a class. The majority of their answers centered around learning about people from various ethnic, racial, and religious backgrounds, how to interact with those same people once they complete their nursing program, how to gain a deeper understanding of how society operates, understand work behavior, and understand group behavior. Below, is a sampling of some of the nursing students’ responses to the value of taking a social science class in their curriculum. The student respondent responses are typed out exactly as they appeared on the questionnaire. Any misspellings or grammatical errors have come from the direct quotes of the student respondent. The researchers believed that typing out the responses exactly as they appear would offer more “effect” to the reader.

**Student 1**: “It’s going to better prepare me to take care of my patients to the best of my ability.”

**Student 2**: “I will be better equipped to provide safe and efficient care to patients in my practice by better understanding the problems that we are facing in society.”

**Student 3**: “It will teach me how people think and why they act the way they do. It will also help me in my current career at the hospital since I work with patients all day.”

**Student 4**: “This will help build in my social aspects of nursing. Also will help within communicating and understanding different poverty levels and cultures.”

**Student 5**: “This social science course will benefit me in many ways in my profession as an RN. It will provide understanding and knowledge about how people are the way they are, and allow me to care for my patients better as I will be more educated. I think this course taken online can also benefit me in my major by understanding the patients I am assigned to during my clinical rotation.”

**Student 6**: “This class is chosen so that we know how to communicate with people; understand their different ethnic and cultural views; and so we can learn how to best treat people. This class was also chosen so that we can learn about the society around us. I also think this class will give me a view of the whole world beyond my community in a global perspective. I want to be a medical missions nurse so this will be very helpful to learn how other people respond to their environment and how I can adapt to meet their physical and mental needs.”

**Student 7**: “Taking sociology will benefit me in my career in many ways. As humans we all come from some social class; knowing and better understanding those classes will help me to understand different views of health care amongst specific classes. I will also have some understanding of how others might accept education, how financial classes affect health care as well as cultural background.”

**Student 8**: In order to graduate from the ADN (Associate Degree of Nursing) program, this is a required class. Taking sociology online will require me to learn more about the social world which will benefit my career because I will be working directly with people.”

**Student 9**: “This helps me understand individuals and different situations that can come up while I am a nurse. It is also helping me be more rounded and have a deep connection to all individuals.”

**Student 10**: “It will help me be able to better relate to my patients.”

**Student 11**: “Working in a professional medical establishment, I will have to work with patients that come from all walks of life. Taking social science classes prepares me for this by introducing several ways of processing social differences and opinions in the world.”

**Student 12**: “I think it will help me understand people a lot more and what they think since I will be talking to many of my patients every day.”

**Student 13**: “It will help because sociology helps a nurse understand what makes people the way they are. By better understanding people and groups of people, it can help me to become a more compassionate, gentle, kind nurse.”

**Student 14**: “Nurses deal with society 100% of the time in their career. It helps us to understand people in general.”
Student 15: “I’m already a Licensed Practical Nurse (LPN) and want to further my education. This class is already beneficial because it gave me a wider perspective towards different social issues we are facing here in the U.S. and globally as well. Taking this social science course online is going to benefit me to broaden my general knowledge about my surroundings and the society I live with.” Student 16: “Taking a social science course online is going to benefit me in my career because by taking sociology I understand what society is like and the different types and it will help me understand when I am working with patients in the medical field.” Student 17: “It helps nurses understand their clients better and understand why they do the things they do. Also, it helps understand different people’s cultures and attitudes to every day situation.”

Student 18: “Helps me understand how people relate to health care. Also helps me understand the disease process in different cultures and societies. This class helps me relate to people of other ethnic groups, helps me understand their beliefs. Showed me more on how people interact with one another; from large groups to the individual. Student 19: “This social science course is going to benefit my career because I am going into nursing and I will be working with all different types of people with different backgrounds who speak only a certain language or who might do things a little different than we do. It will help me get a better understanding of why some people might come across into the hospital the way they do and choose to have the attitude they have when they come in.” Student 20: “This is a very good question. My guess would be that in nursing, I am going to run into all kinds of people and different cultures, so sociology helps with that area. This class is also teaching me about what I need to know and how things are perceived in the world. This class is also very beneficial in understanding a lot that I was not even aware of.”

Human Services/Social Work

Human Services majors represented the second largest major of study in this study. As of the 2014-2015 academic year, it is the fifth most popular major on campus. The Human Services majors offered commentary related to the sociology or gerontology classes they had taken online. Both Human Services and Social Work majors were put together in this category. The two majors are very similar, and many of the Human Services majors transfer from the community college to a four year college, to study Social Work. Between the two majors, they represented 23 of the 110 student respondents in this study. A sampling of the student responses are below.

Student 1: “Knowing more about the world can help everyone. Maybe I want to go in to social work and I’ll need to know how to find out what is happening out there in my category.” Student 2: “Social Work takes discipline and taking an online course helps me be intentional about meeting what is expected of me.” Student 3: “My major is Social Services, so knowing what is going on in the world will help me help my clients. There are different difficulties that go on in different cultures, so I can apply that to helping them. I can use what I learned in Introduction to Sociology online, and in this class, Social Problems online, to make helping them easier. Once I begin my career, I will be able to understand what the children’s parents are going through. I will hopefully be working in an elementary school; understanding their parents will help me understand the children.

Student 4: “I will have social problems every day in my field of work and being aware of them, understanding some of their causes, will be very helpful. I think I will be able to be more open-minded.” Student 5: “I will have to work with society every day.” Student 6: “The reason that taking this course will benefit me in my career is because if I do choose to work with the elderly population with human services, I have learned a lot of information about different aspects related to the elderly population throughout this course. I will be able to incorporate the information I have gained from taking this course into my professional life.”

Student 7: “It has given me insight as to how the senior population works and how to deal with them.” Student 8: “Working in a nursing home I can have a better understanding of how things can work as you age and know how to handle other situations.” Student 9: “Since I am working toward a degree in Human Services, this will provide background knowledge to help me in my chosen field. It also eliminates my need to commute and gives me an opportunity to use that commute time to study and complete assignments. Less stressful because there is less financial burden when there is less commute.
Student 10: “Social Science is a major part of human services as human services deals with a variety of populations from every social class. The information learned can be used to better help those who are different than myself.”

Student 11: “I am working on a degree in social work, so the classes I am taking will directly affect my career as a CPS worker, which is my ultimate goal. Student 12: “As a Human Services major, it required an understanding of how social environments factor into a person’s behavior. Hopefully, I may be able to assist people that I may not have understood where they were coming from if not for this course.” Student 13: “I am going into Human Services to work with families that have children with behavioral, mental, and etc. to help their families to become well, and to help them find resources etc.”

Business Administration

Business Administration represents the third most popular major in this study. Approximately 14 out of the 110 student respondents reported being a Business Administration student. However, Business Administration is the second most popular major on campus for the 2014-2015 academic year. A sampling of some of the Business Administration students’ responses are below.

Student 1: “My ultimate career goal is to own my own business, a bakery. Sociology would allow me to be a better business leader. If I could predict what my customers need and want, then I would be able to better supply that. Social Science also comes into play with employees when dealing with potential problems. To be that successful business leader, you have to be able to understand people.” Student 2: “By taking sociology, it will get me started in how business works and how politics and law works, which I will need when I am going to be the manager of a company.” Student 3: “My major is BSN/Associates of Science. This class will give insight to the community and society around me, which creates lots of topics to discuss and debate. Having an understanding of the society around me gives me knowledge about the people I want to be of a service to.”

Student 4: “I have found that a cursory knowledge in how our species tends to function is at the very least, great for conversation, and can be advantageous when in leadership roles.” Student 5: “I am going into Business Management, so it may be helpful to know information about other cultures.” Student 6: “As a business major, it’ll help me know what’s going on in the world and how to handle people because I’ll be dealing with people on a daily basis and it’ll help me understand what they want/need.” Student 7: “My career will deal with people and society (it will actually depend on it). It will be critical for me to identify and respond to social problems and adjust my work accordingly. This information will also be used to plan and prevent the conditions of the problems from damaging my business and livelihood.”

General Student Population

Out of 110 respondents, the remaining 40 student respondents participating in this case study represented a variety of majors ranging from Occupational Therapy Assistant, Teaching, Radiology Technician, Academic Transfer, Psychology, Criminal Justice, and other popular majors on campus. Below, is a sampling of how some of the general student population outside of the three most popular majors on campus answered.

Student 1: “Well, I want to try to continue on to maybe someday be a teacher. Therefore, social science courses are useful on helping me understand how people think and operate.” Student 2: “It will help me gain an understanding of society more, where Psychology is more dealing with the individual person.” Student 3: “It helps me to have self-control and self-awareness of due dates; it teaches me to work hard and be determined; and it also allows me to set goals for myself.” Student 4: “For me, it will give me a better understanding of people and cultural diversity.” Student 5: “In many work place settings, there are many different kinds of people that I will have to deal with. Learning about all of the different kinds of people, cultures, and issues in the world will help when dealing with daily situations.”

Student 6: “It will benefit me in my career because it’s going to teach me how our society works, and how I even work at times. It shows me how to react to things properly and how other people may react to things as well. It helps show that even though many people may have different personalities and different religions, deep down, we’re all very similar to each other and I can use to the best of my abilities when working with patients.”
Student 7: “Understanding how and why people related to each other the way they do is helpful in just about every aspect of life.” Student 8: “My career to this point and into the future has been in retail management. The better I understand the behavior of people as they interact with others will help me make better decisions in my field. These decisions will include advertising decisions, merchandising decisions, or just decisions on how to get customers to buy what I want. This course will also help me understand my employees and the way they interact in certain situations.”

Student 9: “In the education field, social science is very important. You have to look at the bigger picture than yourself. I can understand how I best learn and how I would interact with the other children, but as they teacher it is now your role to know these things for more than just yourself. Society is all around us and we act in all the time, the way I see it, learning as much as I can about relationships and how we interact can help prepare me to interact in a classroom with 25 different cultures.”

Student 10: “It will educate me on how our society works. It will teach me what problems occur in today’s society, and how they are resolved. It might help me be able to interact better with people, and teach myself how to interact better with people.” Student 11: “In an Occupational Therapy major, having more social science knowledge will allow me to apply my learning in occupational therapy to more aspects and areas. I feel I will know more about what to expect in the real world when I am practicing in my career. It will be helpful to know about social aspects, in particular social problems. The things I learn in this course should help me benefit my future patients even more by opening my eyes to a more diverse curriculum.”

Student 12: “Working in Healthcare Administration Management, I will work with not only employees, but patients on a daily basis, being aware of current issues will help me to be better prepared to make decisions that affect the daily routine of the business where I will be working. Also, knowledge of current issues will help me to understand diversity and different points of view better. I think that being aware of social problems that people are facing today helps me to become a better, more compassionate person.” Student 13: “It’s going to give me some insight on some of the cultural problems that have to do with society. It’s going to help me with understanding different people in the workplace or people I encounter there.”

Student 14: “It is going to benefit my career because there may be situations where I only communicate with someone over the computer and never see them face to face so this course online helps me to becoming familiar with communication over the computer and how to properly and appropriately communicate over the computer.” Student 15: “It will allow me to have broader awareness of all types of people from different cultures and backgrounds.” Student 16: “I will learn to better understand how different people act differently, which will help me know the best way to handle the person.”

Student 17: “I will better understand people and their behaviors because I can reflect on the possible social causes.” Student 18: “I want to be an elementary school teacher and this class is going to benefit me because it has taught me about the social issues so many people face. It’s given me a new understanding of people and our differences.” Student 19: “I work in a regulatory agency for the government. I have to deal with all sorts of people on a daily basis and it’s not always to deliver the information they want to hear. I am not always sure whom I will be discussing information with whether my own management or industry’s. I think dealing with people socially is something that can always be improved upon. This course will not only help me sharpen my skills with communication, but adds to a résumé for promotion purposes.” Student 20: “It will help me learn better than taking it in class. I feel like social science classes require more time to learn the information than say like a math class.”

No Answer/Negative/Unsure

Out of the 110 student respondents of this study, only eight students are represented in this category. Of the eight student respondents, only three students did not answer the guiding question for this research study: “How is taking a social science course going to benefit you in your career?” There were five student respondents who answered either negatively or with an unsure response. Their responses are below.

Student 1: “I am really unable to tell at this point how this class is going to benefit my career. I’m almost certain it will benefit me in the long run though. Being able to understand the social problems of
the world can always come in handy.” Student 2: “I’m not really sure, this is my first online course.” Student 3: “It helped me understand that I didn’t want to work in geriatrics.” Student 4: “Hopefully it’ll help me deal with people in a way I guess. I’ll have to learn more about this course before I can completely answer this question but I bet it’ll benefit me majorly.” Student 5: “I’m not real sure…….Who knows what the future holds?”

**Limitations**

There are several limitations to this case study. First, we only focused on our community college and community college students in general. We are hopeful that our study will generate dialogue for future, larger studies pertaining to student perceived “value” of taking social sciences courses online and the benefits they will gain for their future careers. This study could have been strengthened by having more community colleges from around the Midwest participate or have other community colleges from other regions of the country represented.

Second, more female respondents (86%) participated in the study than male respondents (14%). Future studies related to this topic will need to be more aggressive in obtaining male respondents.

Third, racial bias was evident in this study as well. Approximately 82.7% of the respondents were white; 10.9% of the respondents were Hispanic/Latino; 2.7% of the respondents were Black; 2.7% did not answer the question related to race; and only 1% of the respondents were Asian American. Future studies related to this topic need to be mindful of collecting data that is more representative of the community college as a whole.

A fourth issue was the number of respondents in our case study. Only 110 participants over the course of the 2014-2015 year agreed to participate in the study. Fifth, and finally, another limitation to the study is the fact that only three social science courses were used for this study. It must be noted that these were the only courses approved to be used for this study. However, if more social science courses were used, it may have affected some of the outcomes of this study. Future studies conducted at this community college or at other community colleges should take this into consideration and survey students in a wider array of social science courses.

**Conclusion**

This research attempts to study whether or not community college students perceived any future career benefits of taking social sciences courses online. The study endeavors to go beyond simple, surface-level answers. Only eight out of the 110 respondents either refused to answer the question or had a negative comment to offer. The remaining 102 student respondents offered commentary to the question that was very positive.

Clearly three of the five most popular majors at this community college were well-represented in this study: Nursing, Business Administration, and Human Services. It is also evident that when compared to their peers in other majors on the various campuses, the students from these three majors see more inherent value in taking social science courses online in terms of cultural understanding, understanding how people think, understanding group dynamics in the workplace, and understanding the importance of communication and sensitivity to others in the workplace than students from the other majors.

In sum, it was the Nursing majors, Business majors, and Human Services majors who agree the most that online social science courses would benefit them in their future careers. This finding falls in line with the research of Stuart, Rios-Aguilar, and Deil-Amen (2014); Baldwin, Bensimon, Dowd, and Kleiman (2011); and Nitecki (2011). In these prior research studies, the authors state that students in the health sciences, business, and other specific program majors at community colleges face different job market incentives. These incentive structures affect students’ decisions to enroll, persist, and succeed. They also found that models of student persistence in classes need to consider not only the potential benefits of the various labor markets but also the costs that community college students incur while attending class and attempting to complete their degrees. Finally, the general student population overall in our study found some value to taking online social science courses, but not to the same degree as our program students did.

Perhaps another key finding to this study was the community college students’ perception of how not only the content of the social science courses would benefit them, i.e., understanding problems in society,
learning about diverse and disenfranchised populations within our society, understanding how different cultures operate, and learning about different social classes; but also how to be better communicators by having taken an online social science course. Essentially, the students are reporting the understanding of culture and problems within society as one would expect, but they are also reporting on how these online social science courses are also going to make them better communicators in their future professions. As one nursing major reported: “This will help build in my social aspects of nursing. Also will help within communicating and understanding different poverty levels and cultures. Another student reported: “I am going to be working on people’s computers, so I am going to need to know the behavior and problems they are going through.” Finally, another student reported: “It is going to benefit my career because there are situations where I only communicate with someone over the computer and never see them face to face so this course online helps me to becoming familiar with communication over the computer and how to properly and appropriately communicate over the computer.”

Future studies need to examine this topic in greater depth. This could be accomplished using a variety of methods. First, more student respondents to fill out the questionnaire. Second, conduct a larger study which would include students from a variety of majors. Third, conduct a large study of all community colleges at the state level or national level using the instrument from this study. Finally, perhaps another approach, would be to focus on one specific major area of study at a time within the student population when administering this survey instrument to online students.

The researchers would like to thank those 110 strong, hard-working independent students from our community college system for their participation in this study. Without their candidness and candor in their responses, this research would not have been possible.

References


of-people-who-benefit-from-community-college


Using the Example of Historical Leaders to Foster Leadership in Students

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Introduction
The leadership challenge for secondary students is to first seek to understand the globally destructive behaviors of self-interest, incivility, greed, coercive power, zealotry, and violent extremism exhibited so provocatively on the world stage. The leadership lesson for aspiring student leaders in a connected world is compelling. (Bowman, 2014, p. 59)

For today’s students, the world can appear to be a difficult and, at times, a frightening place. In this world of challenge and obstacle, conflict and turmoil, students may feel overwhelmed and alone.

They are, of course, not alone. In addition to parents, communities, teachers, and others concerned with their benefit and development, students also have other voices inspiring them to face and to defeat the difficulties of the world around them, other examples showing them how to interact with chaos and confusion. The behaviors and perspectives of great leaders of the past provide a tremendous and very practical archive of lessons for young and aspiring leaders.

Conscientious teachers, then, who seek to transfer the leadership of society to the next generation of capable leaders, are encouraged to apply the examples of history’s best leaders to the research-based youth leadership development paradigms of the present in their work with the future’s most necessary asset — leaders. This paper, then, seeks to accomplish three things: first, it provides a review of the current research-based practices that best improve leadership skills in young people; second, it briefly presents how historical leaders addressed and accomplished those practices; and finally, it suggests some ideas for connecting potential student leaders with these historical examples of powerfully effective leadership through powerfully effective instructional approaches in the history classroom.

Leadership Development in Youth: Current Research-Based Understandings

The Effectiveness of Leadership Training and Development.
Simply put, leadership can be learned and learned by all students. As evidence, one study with adolescent participants in an economically disadvantaged area of Alabama who received focused leadership training perceived their own ability as leaders to have grown dramatically as a result of the training and mentorship in leadership they received. These gains were strongly statistically significant and were consistent with the results of previous studies (Smith, Genny, & Ketring, 2005). The research emphasizes that mentorship is an especially effective means of developing leadership in young people (Besnoy & McDaniel, 2016).

Interestingly, intelligence appears to have little impact on the potential to grow as a leader. A study of 176 students found no significant correlation between leadership skills and giftedness. In fact, the highly intelligent students who participated in this study only experienced a statistically significant increase in their planning skills. In other leadership areas — communication, problem solving, etc., no significant means differences were found (Muammar, 2015). In other words, leadership is accessible to students across all ability spectrums almost equally.

While leadership can indeed be learned and learned by all students, like all other complex behaviors, it must be taught. It does not happen naturally as a part of ordinary student growth and development. Leadership development, to be fully effective requires an intentional effort on the part of youth leaders and teachers. Purposefully engineered and widely varied experiences for students have the greatest overall possibility of increasing leadership development. These varied experiences include the observation of good leadership, discussions about good leadership, and, of course, the practice of good
leadership (Gould & Voelker, 2012). Finally, the emphasis on increasing student voice in the leadership of institutions that serve them – schools, sports teams, service organizations, etc. – seems to be an especially meaningful way to increase leadership capacity in students. Voice, here, refers to the need for students to be genuinely heard and the need for students to be engaged in meaningful collaboration with adults (Mitra, 2006).

While these focused and organized youth leadership development programs are most effective, individual classroom teachers can have a similar role in helping their students grow as leaders. To accomplish this important goal, teachers are encouraged to model excellent leadership themselves, to delegate regular classroom functions, and to assign individual leadership-requiring academic tasks like project-based learning, and to provide authentic scenarios or simulations where leadership can be practiced (Rice, 2011).

Leadership as “Soft Skills” of Values and Empathy.

What, though, are the traits and characteristics most vital to leadership development? Here, as expected, experts differ, but current research and practice stress the “heart” of leadership over mere leadership activities. Most respected leaders in the field now emphasize internal values — not externally mandated actions or organizational rules — as most vital, arguing that compassion is the best predictor of leadership potential (Bowman, 2014). Some refer to this emphasis on moral and others-centeredness as “transformational leadership.” More precisely, transformational leadership is a paradigm that includes caring for others, positive or optimistic motivation, problem-solving instead of complaining, collegiality and acceptance over competition and restriction, and appropriate role-modeling (Gould & Voelker, 2012).

Jennifer D. Klein (2012), an experienced educator and leader of an organization that strives to provide training for teachers seeking to improve global awareness and student leadership, organically connects transformational leadership and student development, stating, “We can help students understand that what matters most as they go out into the world is their willingness to take on the most inglorious of jobs for the most compassionate of reasons” (p. 72).

While this emphasis on values and compassion is certainly appropriate, leaders need other traits and competencies to experience success. A recent large scale survey attempted to identify the most important traits for young leaders to possess and to enhance. These traits include self-motivation, discipline, communication, learning agility, self-awareness, and adaptability or versatility. In addition to these current requirements, in the future, the next generation’s leaders will also need to possess multicultural awareness and a strong ability to collaborate (Van Velsor & Wright, 2012).

In conclusion, then, what are the research recommended youth leadership development approaches that yield the greatest benefit? Several items from the discussion above should be seriously considered for inclusion in any youth leadership development initiative and will form the basis for the consideration of historical leaders to follow. These focus leadership elements include mentoring others, a strong commitment to others-centeredness, effectiveness in communication, an unwavering reliance on collaboration, adeptness at adaptability, and accurate self-awareness.

Leadership Examples in History: Summary of Great Leaders’ Practices

Historical Leaders’ Mentoring of Others

In 1928, Mother Theresa started her ministry to the poor, initially in Ireland, and then later in Calcutta, founding the Order of the Missionaries of Charity to work with the world’s neediest in unimaginable slums of poverty. By the late 1970’s, her work had attracted and involved more than 1,000 nuns in 60 centers around Calcutta and in 200 centers around the world. She described her approach to leadership and to individual mentoring, saying, “Do not wait for leaders; do it alone, person to person” (Anderson, 2007, pp. 24-25).

President Theodore Roosevelt was also fully committed to the development of his subordinates. In his 2001 book, Theodore Roosevelt on Leadership: Executive Lessons from the Bully Pulpit, leadership scholar James Strock described Roosevelt’s mentoring approach extensively, listing the President’s major approaches to developing leadership in others as follows: demonstrating faith through the delegation of authority, supporting and protecting the team consistently, reinforcing delegation with careful intervention, recognizing impressive accomplishment, accepting minor mistakes, overlooking minor
disagreements, and conveying thankfulness and loyalty to the team members (pp. 146-159). Roosevelt himself summarized his attitude toward empowering others to lead alongside himself, commenting, “[The leader] has the reins always and can shape the policy as he wishes it, and it is for his interest to have each department run by a man who will carry out his general policy, but will be given large liberty as to methods of carrying it out” (as cited in Strock, 2001, p. 146).

**Historical Leaders as Transformational Leaders**

While the theory of transformational leadership could not possibly have been known to Abraham Lincoln, having been developed long after his death, he seems to have been preternaturally aware of its principles and usually acted well within its prescriptions. In speaking of influencing others, he once commented, “If you would win a man to your cause, first convince him that you are his sincere friend. Therein is a drop of honey which catches his heart, which, say what he will, is the great highroad to reason” (as cited in Holmes & Bah, 1998, p. 22). Similarly, Martin Luther King, Jr., understood the role of others-centeredness in effective leadership, memorably stating, “Every person must decide whether to walk in the light of creative altruism or in the darkness of destructive selfishness…. Life’s most persistent and urgent question is, ‘What are you doing for others?’” (as cited in Anderson, 2007, p. 40).

George Washington was another leader who grasped the tenets of transformational leadership, especially its moral components. He once commented, “I hope that I shall possess the firmness and virtue enough to maintain what I consider the most enviable of all titles, the character of an honest man” (as cited in Anderson, 2007, p. 32), showing his passionate adherence to strong ethical behavior and personal integrity as the foundation to his principled leadership. Dwight Eisenhower would certainly have agreed, even more simply stating, “The supreme quality for leadership is unquestionable integrity. Without it, no real success is possible” (as cited in Anderson, 2007, p. 65).

**The Great Communication Abilities of Great Leaders**

While all truly great leaders were great communicators, Teddy Roosevelt stands out strikingly in this area. Strock (2001) identifies numerous characteristics that make Roosevelt a great leader whose communication skills should be taught to and developed in young aspiring leaders. Four of those are bulleted below.

- The leader-communicator genuinely believes in his or her message. There is sincere harmony between what is espoused and what is practiced or promoted (pp. 179-181).
- The leader-communicator is transparent and real with his or her audience. His or her communication is relational, not transactional (pp. 160-161).
- The leader-communicator is clear and precise in his or her expressions. S/he is intentional in his or her choice of words and is effective at communicating the intended message, limiting listener misunderstanding and confusion (p. 196).
- The leader-communicator uses simple and ordinary anecdotes to communicate complex truths. S/he understands that stories often communicate far more effectively than merely lectured content (p. 196)

**The Collaborative Focus of Historical Leaders**

In the darkest days of World War 2, as the United Kingdom faced daily, destructive bombardment by the German air force, Winston Churchill rallied others to his own indefatigable and unconquerable spirit, confidently stating, “If we are together, nothing is impossible. If we are divided, all will fail” (as cited in Anderson, 2007, p. 12). His unifying leadership was one of the primary reasons his great nation, unlike many of its European counterparts, was not defeated by Fascism. Churchill’s American counterpart, Franklin Delano Roosevelt, was equally adept at collaborative leadership, stating about this topic, “I’m not the smartest fellow in the world, but I can sure pick smart colleagues” (as cited in Anderson, 2007, p. 110).

**Adaptability and Great Leadership in History**

Abraham Lincoln famously stated all of the following:

- “I claim not to have controlled events, but confess plainly that events controlled me” (as cited in Holmes & Bah, 1998, p. 40).
- “As our case is new, so we must think anew, and act anew” (as cited in Holmes & Bah, 1998, p. 40).
- “Yes, I have [changed my mind]. I do not think much of a man who is not wiser today than yesterday” (as cited in Holmes & Bah, 1998, p. 41).
- “I shall do less whenever I shall believe what I am doing hurts the cause, and I shall do more whenever I shall believe doing more will help the cause. I shall try to correct errors when shown to be errors; and I shall adopt views so fast as they shall appear to be true views” (as cited in Holmes & Bah, 1998, p. 41).
- “The dogmas of the quiet past are inadequate to the stormy present” (as cited in Holmes & Bah, 1998, p. 41).

With these quotes, Lincoln accurately captured his very adaptable attitude toward the tumultuous events of the Civil War swirling around him. Of all American leaders, Lincoln seemed most flexible with matters outside his core principle of saving the union. If a problem did not immediately impact this central vision, Lincoln exhibited incredible, almost unbelievable flexibility.

**Historical Leaders’ Accurate Self-Awareness**

Nelson Mandela certainly understood that his own influence was built on a truthful and accurate self-understanding. Expressing this fact, he once commented, “The first thing is to be honest with yourself. You can never have an impact on society if you have not changed yourself” (as cited in Anderson, 2007, p. 70). Likewise, Andrew Jackson, though of a different era, absolutely understood that leadership requires a certain tough-minded attitude toward self; he stated, “Any man worth his salt will stick up for what he believes right, but it takes a slightly better man to acknowledge instantly and without reservation that he is in error” (as cited in Anderson, 2007, p. 151).

**Using History to Develop Youth Leadership**

**Instructional Approaches in History Education to Develop Youth Leadership**

A quick survey of currently emphasized instructional practices in history education include a focus on simulations, primary sources, historiography, historical inquiry (or historical thinking), classroom discussion, and, of course, educational technology. This study will briefly review and apply just two of those: historical inquiry and educational technology as effective mechanisms for the development of leadership skills in students.

**An Example of Using Historical Inquiry to Develop Young Leaders**

History teachers’ self-identified purpose for teaching was found to be the strongest predictor of their ability to support historical thinking. When history teachers see their role exclusively as the transmission of content knowledge in history, for example, they tend to be less apt to stress historical inquiry in their instruction. On the other hand, when history teachers perceive that their professional purpose is to foster critical thinking about historical events and the impact of those events on contemporary issues, then historical inquiry becomes more prevalent in their instructional approaches (Swan & Hicks, Fall 2006-Winter 2007).

The synthesis of this recommended type of history teaching with student leadership development is certainly not hard to identify. In the social studies class where historical inquiry is valued and student leadership is prized, the teacher fosters learning experiences where the student explores how and why leaders acted as they did, recreating or simulating the circumstances that led to important decisions. Further, the student leader as historian should then be encouraged to apply the lessons learned from that decision-making process to contemporary problems facing young people today. For example, how might the collaborative decision-making processes led by John F. Kennedy during the Cuban Missile Crisis help a student leader today to find solutions to online bullying or peer pressure to use illegal substances? How might a student leader follow the example of Abraham Lincoln to communicate to his peers about the need for greater compassion and social justice in the school environment?

**Educational Technology, History, and the Development of Leadership in Students**

Nothing has improved the teaching of history in recent years nearly as much as the Internet. John K. Lee (2002) of Georgia State University summarizes this incredible change well:
Digital technologies (particularly the World Wide Web) are providing historians and social studies and history students and teachers with expanded access to primary historical sources. In addition, digital technologies are facilitating new methods for presenting both primary-source historical materials and the narratives that result from historical studies. The availability of these new resources and methods make for a unique and powerful opportunity to shift the locus of history and social studies instruction from a teacher-centered transmission model to a model that encourages student's inquiry. (pp. 513-514).

History and other social studies teachers, then, interested in the development of leadership in their students should consider the following possible instructional approaches. First, teachers may direct students to the actual writing and speaking of great leaders to see and hear their communication skill, their commitment to others, and their sense of community or collaboration. For example, student leaders might once again watch to Martin Luther King’s “I Have a Dream” speech, looking for ways to influence others to seek greater racial harmony in their neighborhoods, or they might review the wording of the Declaration of Independence to see how to cause a greater sense of equality among their school’s cliques of athletes, “nerds,” or musicians.

Second, using these online tools, student leaders should be encouraged to find for themselves examples and evidences of effective leadership in history, applying these researched leadership skills to their own problems and challenges. What lessons are in Eisenhower’s planning for the invasion of Normandy that future leaders can apply to their own efforts to build consensus and to solve problems? How might the caring example of Mother Theresa help student leaders to promote a more compassionate environment in their towns or communities?

Conclusion

Leadership has always been a prized commodity. Today, though, because of the incredible complexity of modern society and the seeming intractability of modern problems, leadership is even more highly prized than before. As a result of this apparent truth, the development of leaders from the ranks of the younger generation seems paramount. Current academic literature indicates that the best means of developing young leaders is, among other less commonly emphasized approaches, six-fold: mentorship, altruism, communication, collaboration, adaptability, and self-awareness.

Thankfully, this leadership development does not have to occur in a content-empty void. History itself provides countless examples of great leaders who exhibited these identified traits in meaningful ways. The conscientious history teacher, then, can refer to these historical examples when developing leaders in his or her classroom. Two instructional approaches in the teaching of history — historical inquiry and educational technology — can be very instrumental in helping students connect their own leadership growth with the example of effective leaders of the past.
References
An Assessment of New Hispanic Immigration on an Old Coal City: A Case Study of Positive and Negative Effects Regarding Hazleton, Pennsylvania

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The study of the Hazleton Area, its population and cultural changes over the past 14 years has produced many interesting and important lessons not only for the city in which these changes occurred, but of many municipalities and regions of the U.S. This author has written several articles about population change and its effects on the Northeast Pennsylvania over the past 10 years. This paper is a summary analysis of these changes and a series of comments on how we as social and political scientists may be able to understand and utilize the information. In no manner should it be construed that the case study of Hazleton is a perfect fit in understanding every other case of newcomer settlement in regions long time unchanged. There are significant characteristics that can however be extrapolated from such a case study to many other municipalities across the U.S.

In 1990, the Hispanic population of the Greater Hazleton Area was measured by the U.S. Census at a total of 249 individuals. For a city population which numbered near 25,000, this number or mostly professional individuals of various Spanish speaking nationalities remained an insignificant matter. Dramatic change became was observed in the 2000 U.S. Census in which the city population figures of Hispanic rose to 1132. Individuals in the social service community, local school district, and local academic communities recognized the change occurring in the community and felt compelled to begin an investigation concerning the population change. Along with examining the census reports of 1990 and 2000, a community study project entitled “Voices of the Community” was initiated. The study was written by local Catholic Church leaders, social service leaders and Dr. Stephanie Bressler of the Political Science Department of King’s College in Wilkes-Barre, Pennsylvania (Bressler, 2003).

Most importantly, reasons for migration from New York and New Jersey along with the needs of these newcomers were investigated. Data presented in the report indicated that the most significant reasons for migration from the large metropolitan areas of New York/New Jersey along with immigration form other countries to Hazleton matched closely the same reasons offered by immigrants of earlier times in history. Most responses indicated that they were interested in developing a better life, job opportunities, a quiet and slower pace life, and finally better educational opportunities for their children (Bressler, 2003).

In a preliminary needs assessment of the Hispanic newcomers the report posed somewhat different challenges to the immigrants of previous eras. Language, working skills sets, housing, and educational needs were similar in most cases to older immigrant groups. Strong cultural differences, limited educational backgrounds, unrealistic expectations in education, and lack in many cases of a willingness to assimilate with the rest of the community posed significant problems to over come (Bressler, 2003). In 2003/04, this author began his ethnic studies of the issues facing Hazleton and the entire Northeast Pennsylvania regarding these issues.

One of the first issues addressed in these studies concerned how large and quickly the newcomer population was growing in the area and therefore how significant the above issues would become. As one can see from the information provided below, the projection of population growth using a simple program and chart in 2004 forecasted a very significant change that would occur in the decade between 2000 and
2010. The population was calculated to reach approximately 8000 to 9000 newcomers by 2010 (Sosar, 2004).

When the 2010 U.S. Census figures were published in 2011-2012, the reported numbers can be compared and found to be quite similar to the projections of 2005. Because of the criticism of the 2010 census report (Le, 2008) it should be noted that while the figures are nearly exact to the city Hispanic population, there is a significant possibility of under-estimating newcomers that would be expected. Many of the newcomers faced an inability to read, write, and speak English and were therefore surely under-reported in the count. Time certainly has increased the population in an even greater exponential manner. It is safe to assume that the Hispanic population of Hazleton is approximately 14000 to 15000 individuals and the overall city population is closer to 30,000 residents today in 2015. Statistical data using the same population figures with updated census figures of the 2010 report are noted below and are represented in a similar scatter gram to the previous charts.

<table>
<thead>
<tr>
<th>Year</th>
<th>Hispanic Pop.</th>
<th>Total</th>
</tr>
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<tbody>
<tr>
<td>1970</td>
<td>2</td>
<td>30426</td>
</tr>
<tr>
<td>1980</td>
<td>71</td>
<td>27318</td>
</tr>
<tr>
<td>1990</td>
<td>249</td>
<td>24730</td>
</tr>
<tr>
<td>2000</td>
<td>1132</td>
<td>23329</td>
</tr>
<tr>
<td>2005</td>
<td>4585</td>
<td>22848</td>
</tr>
<tr>
<td>2007</td>
<td>6878</td>
<td>22729</td>
</tr>
</tbody>
</table>

When investigating the obstacles and needs of the newcomers and their ability to assimilate, this author originally depicted the issues through the policy-making model of Cohen, Marsh et al., The Garbage Can Model. There are a number of problems, solutions, participants and opportunities in the
policy streams that were available in such a complex issue. Community leaders have been challenged of providing services to such a significant newcomer group. The problem was magnified because the community had not witnessed a change in ethnic, racial or religious change in eighty to one-hundred years. In 2004, this author presented the following diagram of the John Kingdon’s Garbage Can Model as it seemed to relate to the Greater Hazleton Area.

<table>
<thead>
<tr>
<th>Problems</th>
<th>Solutions</th>
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</thead>
<tbody>
<tr>
<td>Interpreter for health problems</td>
<td>Bilingual educational programs</td>
</tr>
<tr>
<td>Interpreter for banks, social services and legal assistance</td>
<td>Translators</td>
</tr>
<tr>
<td>Bilingual instruction in schools</td>
<td>Teacher training educational programs</td>
</tr>
<tr>
<td>Transportation</td>
<td>Counselors trained in Spanish</td>
</tr>
<tr>
<td>Low and affordable housing</td>
<td>CAN DO and Chamber of Commerce</td>
</tr>
<tr>
<td>Finding and keeping jobs</td>
<td>Cooperation of religious and community services</td>
</tr>
<tr>
<td>Jobs/Business startup</td>
<td>Assistance in providing cultural assimilation</td>
</tr>
<tr>
<td>Problems with law enforcement</td>
<td></td>
</tr>
<tr>
<td>Immigration status</td>
<td></td>
</tr>
<tr>
<td>Cultural acceptance</td>
<td></td>
</tr>
</tbody>
</table>

Since 2004, there have been important negatives and positives that have occurred in the City of Hazleton and Northeast, Pennsylvania. Over the past decade many of these issues have been exacerbated due to events which have occurred within the city limits rather than solved. The most obvious issue which strained relations between old-time residents in newcomers related to the increase in city crime rates and especially those of a violent crime nature. The city crime rate reporting violent crimes (murder, rape, assault, robberies, burglaries, thefts, auto thefts, and arson) rose for 163.1 crimes per year in 2000, to 264.6 crimes per year in 2011 (Onboard Informatics, 2013). This crime rate as related to national figures rose from approximately one half the amount of crimes reported per average US city to slightly higher than crimes per average US city in 2011. This is not meant to reflect negatively on newcomers moving to the city. Many small communities are witnessing increases in big city crime, gangs, and an increase use of drugs in the decade created a negative view of any newcomers to the region (Onboard Informatics, 2013).
Violent crime rates for the years between 2004 and 2007 could not be obtained by this author. The significance of this issue related importantly to the passage of the Illegal Immigrant Relief Ordinance passed by the Hazleton City Council in 2006. The Mayor and City Council at that time claimed to be reacting to rashes of crimes committed by illegal aliens living within the city. While no number of crimes committed by illegal aliens are kept by the city of state law-enforcement organizations, local newspapers reported several high profile shootings, murders and drug arrests associated with illegal aliens. Local media, especially the local newspapers provided an impression that the reason for increased crime was due to illegal newcomers (Barletta, 2013).

In response to a rash of violent crimes and murders, as well as increased blight and drug trafficking connected to illegal aliens in the City of Hazleton, Lou Barletta said, “Enough is enough.”

In 2006, as Mayor of the City of Hazleton, Lou Barletta introduced an ordinance that made it illegal for employers to knowingly hire illegal aliens and for landlords to knowingly rent to illegal aliens. Hazleton City Council passed the Illegal Immigration Relief Act and Barletta signed it into law (Barletta, 2013).

Even though the Illegal Immigration Relief Ordinance was passed, it has never been enforced due to the federal court case Lozano, et al. v. City of Hazleton. The case challenging the law was initiated in 2007, by several local Hazleton residents and the Puerto Rican Defense and Education Fund (Berry-McNulty, 2007) (Galski, 2012). The act has been reviewed and over-ruled by the Federal Court for the Middle District of Pennsylvania as well as the 3rd Circuit Court of Appeals twice. The Mayor and attorney for the case Kris Kobach, Esq. have continued to pursue a review of the ordinance by the U.S. Supreme Court (Galski, 2012).

Since the initiation of the federal court case against the city of Hazleton news media within the city and surrounding area have ceased using the words illegal alien or Hispanic illegal alien to designate suspects accused of crimes. This trend continues to the present day. This does not mean that local residents do not continue to feel a great number of crimes are committed by Hispanic newcomers. Undercurrents of comments by many local residents placed the onus of violent crime on the surge in gang activity by newcomers and their past way of life in another country or metropolitan area. The recent report on increase gang activity and crimes related to drugs published by the federal government seems to add fuel to that opinion. Many drug organizations from Mexico, or other Spanish-speaking lands have been accused of fueling the increase amount of drugs throughout the Northeast section of the United States (Jr., 2011). Many individuals in the City of Hazleton and surrounding areas refuse to admit that there has been an ever increasing demand for drugs in the area which has very little to do with an increase in migration or immigration of any new group into the area. (Pennsylvania State University, 1995)

The fact is that the increase in crime and gang related activity is directly related to the increase in drug use throughout the Northeast region of Pennsylvania in similar manner to most other regions of the U.S. This has very little to do with an increasing newcomer population, but a great deal to do with an increasing city population, limited number of police and a thirst for drugs by an ever increasing part of the population through addiction or recreational use. Overall the crime rate of the City of Hazleton (306.3 rating) is approximately the same as the crime rate across the U.S. (296.6 rating) (Advameg, Inc., 2015).

Tensions between the newcomer population and older residents have become strained on the issue of crime but that is only one of several issues at hand. The lack of trust may have been created by government actions against Hispanic newcomers in Hazleton by the IIRO, but a separation of the two communities continues.

Cultural differences between newcomers and old-time residents continue to create huge gaps in the city attempting to come together as one. Fear or misunderstandings about individuals in uniforms such as firemen and police create barriers that public officials have a difficult time still adequately addressing. Many Hispanic ethnic groups relate uniforms of any type to dictatorships and corruption. Many of the
young Hispanic newcomers are quite capable of speaking English, but parents and older relatives quite often times have difficulty with the language and cultural. The presence of officials who speak English may intimidate older newcomers in particular (Pew Research Center, 2009).

The city of Hazleton is quite different in one respect to many other communities outside of Northeastern Pennsylvania. The dominant Hispanic nationality in many other communities in Pennsylvania and parts of the United States is primarily Mexican, Puerto Rican, and then a variety of other Spanish-speaking nationalities including Dominican (Sharon R. Ennis, 2011). In Hazleton, the dominant Hispanic nationality (well over 50% in the city) is from the Dominican Republic. Locally, the Dominican population control a great number of the Hispanic businesses and related organizations, Casa Dominica, and the Dominican Revolutionary Political Party Headquarters (Palermo, 2012).

Lack of understanding of American culture and the old ways of a city such as Hazleton are foreign to many of the Dominican residents. They are unaccustomed to language, customs, business practices, as well as housing and residential codes among issues. Often this causes the newcomer to fear or shy away from mingling with the Anglo residents of the city or doing business with them. These characteristics have been noted quite significantly in a study conducted by Ohio State University regarding business and cultural differences that divide communities (Nieto). Because of tensions which exist within the various Hispanic nationalities towards one another, and the cultural issues between Hispanic and Anglo, new Hispanic businesses have failed, religious communities worship separately, and a mistrust or apprehension prevails within the city (Arroyo, 2012).

Dominican residents within the city have over the past decade sought to form their own sports organizations such as an entire little league. They have formed many storefront churches, assistance centers, and social clubs which often times exclude many of the other residents of the city. While there’s been a great deal of activity within the Dominican community itself, there have been no recognizable leaders to whom city government, school officials, or leaders in the business community can turn to in order to build effective bridges of communication.

One of the most significant failures that a lack of communication between groups has affected within Hazleton is the number of new Hispanic businesses that have failed through the past 10 years. Hispanic businesses, and especially Dominican businesses are created by families not only to earn an income for the family, but also to leave to future generations as their legacy. This concern is much stronger within the Hispanic community that in the Anglo community (Massachusetts Mutual Financial Group, 2011).

Unfortunately, many family owned and run businesses lack the language skills, cultural skills, a business plan, and the financial means necessary to meet the challenges faced by every startup business. While certainly many businesses will fail in the first year or two and have nothing to do with racial and ethnic issues, Hispanic businesses seem to fail at a higher rate because of the additional problems listed above. While some areas of Pennsylvania have attempted to address such issues with assistance to Hispanic businesses, most notably in the South Central and southern parts of Pennsylvania, this has not been the case in Northeastern Pennsylvania. Academic institutions such as Kutztown University working with the Latino Chamber of Commerce and Hispanic Centers, such as the Spanish American Civic Association in Lancaster have accomplished much to provide success to the small business ventures. They offer business plans, they teach basic entrepreneurial skills, and overall assist these young businesses in whatever means possible to help them flourish (Kutztown University of Pennsylvania, 2012).

While the local Chamber of Commerce in Hazleton has made attempts at organizing businessmen and women within the Hispanic community for such assistance, they have found little success and willingness to join these efforts. Part of the problem obviously is the monetary issue of membership to any organization by new startup businesses; however, the Executive Director of the Greater Hazleton Chamber of Commerce stated that there was also an unwillingness to join any such organization run by a majority of Anglos (Palermo, 2012). A greater effort in this regard must be addressed by not only the
business community of the city but by local academic institutions. This author would suggest offering assistance in the model replicating the Kutztown Model. Without this help, newcomer businesses (barber shops, clothing stores, corner grocery stores, etc.) may find the challenges of entrepreneurship too difficult to master successfully.

Among other issues that have still remain unresolved in the city of Hazleton is the lack of any meaningful Hispanic Center that can be used as an assisting hand to the thousands of newcomers that are arriving in the city and as a bridge to the Anglo community. In cities such as Allentown, Lancaster, York, Reading, and Scranton the establishment of a Hispanic Center which can help provide needed services to Hispanics seems essential. Centers like the Reading Spanish American Civic Association have established corporate components that assist newcomers in their communities with economic, educational, social, as well as health issues. These centers have worked hard within the Hispanic community to assist its members and have also made the Hispanic communities integral portions of their cities.

Our mission is to foster and perpetuate the cultural, social and economic well-being of the Latinos residing in the City and County of Lancaster, and thereby contribute to the general well-being of the community at large (SACA, 2013).

Unfortunately, no such center yet exists in Hazleton to which members of the Hispanic community can look for social gatherings, health clinics, or economic advice. Attempts have been met with untimely problems. The sale of potential building centers, the lack of substantial funding, the passage of the Illegal Immigration Relief Ordinance, and the lack of a real leader in the Hispanic community to take charge, have all played a role in the inability to create such as center. The rapid growth of the city and region’s population and possibly impatience are reasons such a center as of yet has not appeared. Cities as the ones mentioned above who have witnessed successfully bridging community gaps have experienced population surge much earlier than in the Northeast Pennsylvania.

The past decade has not been without its success stories however. In the educational arena, Hispanic students are beginning to perform better at their grade levels than in the past. Through the past decade, Hispanic students have been blamed often for the failure of not meeting the Hazleton Area School District’s “average yearly progress” status (Light, 2012). Low income, “English Language Learners”, and minority cohorts have often been recognized as not performing proficiently enough to allow to achieve its (AYP). Students in the Hazleton Area School District are scoring much more proficiently than in many other school districts while still falling short of AYP goals. These cohorts face more difficult challenges in taking the standardized test than most other groups. Except for “English Language Learners”, many of the students in these cohorts are not Hispanic. Hispanic students are meeting the challenges and succeeding. As Dr. F.X. Antonelli stated to the press about performance and the PSSA tests:

A better way to measure student learning, Antonelli said, is to chart the academic gains each student has made over the previous year. "What we need to do, in my opinion, is look at growth as well as benchmark data," he said. It's a concern Antonelli has taken to Harrisburg in conversations with officials of the state (Light, 2012).

Principals and teachers have noticed the difference in many cases as well. Many students have during the past decade came into the school district with much less of an educational level than their age would suggest (Stefanovich, 2008). They also faced unreal expectations, in some cases being told that simply going to school in America, they would all become doctors and lawyers (Ritz, 2013). Newcomers are still
striving for better grades in many instances to reach institutions of higher learning, but are also utilizing the vocational shops to achieve success in technical skills and the trades. Vice-Principal Ritz suggests that many students are once again understanding the importance and the money that can be made in developing strong vocational skills (Ritz, 2013).

Hispanic students are becoming more active in extra-curricular functions and sports as well. One need only look at the rosters of any male and female sports team or school clubs to notice the participation rate. Hazleton Area High School has witnessed many senior scholars from within its Hispanic cohort and its first Hispanic senior class president. Many more students are taking advantage of outreach programs offered by local colleges to learn about local schools and the programs they offer. Because of cultural characteristics, many Hispanic students prefer to stay at home and commute to college or attend a school closer to home to stay in touch with family and friends or maintain a job. Several two and four year colleges and community colleges offer more students the closeness to home, the courses to start their college career and at a tuition rate that many lower income families need to reach this goal (Ritz, 2013).

A second achievement over the past decade is the establishment in 2013 of the Hazleton Integration Project. While not a Hispanic Center, HIP represents the efforts of Hazleton born Joseph Maddon, manager of the Tampa Bay Rays Baseball Team and his family. Together the members of the family and other concerned citizens both Anglo and Hispanic purchased a closed Catholic Elementary School and turned it into a center. The facility is used for recreation, arts & crafts, learning Spanish or English, and at times a clinic for the low income of the community (Light, Maddon's vision for community center now a reality, 2013). Because it has only recently opened to the community, HIP kept its expectations of attendance to a conservatively low number of participants, approximately 200 children and adults. As it began its second month of operations, the numbers of youth and adults had increased to approximately 800 (Curry, 2013).

The facilities remain a work in progress according to Curry and his Executive Director Eugenio Sosa. Maddon had envisioned HIP as a means of bringing both Hispanic and Anglo communities under one roof. While still in the early stages, the project possesses a great deal of promise and is growing stronger. Time will tell if both communities will share in its great potential and build a bridge of unity. (Light, Maddon's vision for community center now a reality, 2013).

While still few in number, the Hispanic community has become involved in local government. There have been several Hispanic candidates from the Puerto Rican community and the Dominican community who have sought office. While garnishing several hundred votes in the elections, no candidate has as of yet been elected to office. The divide within the community remains but Hispanic candidates are slowly learning the electoral process and obtaining more votes as the years pass. For appointed government positions, several Hispanic individuals have been served on important boards and commissions within the city including the Hazleton Municipal Authority, Zoning Commission, Planning Commission, and the Hazleton Housing Authority.

The Hispanic vote in the city of Hazleton is still significantly smaller than the population can utilize. During presidential elections, the Hispanic vote like many other groups in the U.S. has reached upwards to 50%, however the turnout in local elections is significantly smaller (Sobota, 2013). Many local residents of both Anglo and Hispanic don’t see a need to vote in local elections as voter turnout indicates (Writer, 2013) When interviewed as a candidate, many Hispanics do not know and understand the process clearly enough to get elected to date. A candidate of Dominican Hispanic background, Carlos Mejada did not understand the petition signing procedures as well as local campaigning process. Interviewing him, this author found the candidate had spent a great deal of time outside the city of Hazleton attempting to gain petition signatures at a local Walmart store. Many of the signatures on his petition could have been challenged and disallowed (Mejeda, 2013). Two other Hispanic candidates
attempted to run write-in campaigns but were unable to garner many votes due to a lack of advertising or going door-to-door.

Once Hispanic candidates learn the election process in local elections in Northeast Pennsylvania, and newcomers register and vote regularly, they could become a formidable force in local elections. (Note: Currently there are Hispanic residents on the Zoning Board, Redevelopment Authority, and a recent council candidate in the 2015 local primary election.)

Finally, many of the social service organizations are becoming more adept at working to aid the ever growing newcomer population. Because of the regions low income conditions, newcomers usually do not earn a great deal. The average per capita income in the region is approximately $18,000 per year (Onboard Informatics, 2013). Many social agencies are asked to assist in ways that have changed the paradigm of service needs to low income. Health needs such as increased pre-natal care, dietary issues, mental health, and more must be addressed. Food pantries and kitchens are increasing and changing in what they can serve. Agencies must communicate with potential clients through churches and ministers who serve as dominant sources of information for so many of the newcomers who congregate there (Jureau, 2013). A great number of newcomers are utilizing agencies such as the YM/YWCA, pre-school assistance, scouting for both males and females, and many more of what many communities consider their United Way Agencies.

One of the great assimilators of groups new to the ways of America is time. Children grow-up without many of the concerns for differences that older residents today possess. As generations change, as with many of the ethnic and racial groups who have come to America, assimilation will continue to occur at a more rapid pace. History should remind us that Italians, Poles, and most other non-English speaking immigrant groups were at one time seen as barbaric and incapable of civilizing as had the English speaking Americans (Aurand, 1955).

Bibliography


Curry, R. (2013, June 7). President of HIP Board of Directors. (D. P. Sosar, Interviewer)


The study of gender on the U.S.-Mexico borderlands tends to be multidisciplinary which makes this field of scholarship exciting and constantly evolving. This area of research tends to focus on the “. . . ways gender shapes the conditions, opportunities, and experiences of migration and how migratory processes, in turn, both reproduce gender relations and put them along new trajectories” (Deeb-Sossa & Mendez, 2008). We became interested in this topic due to the political climate and the portrayal of Latino undocumented immigrants as a “threat to the American way of life” during the presidential campaign of 2016. One of Donald Trump’s key arguments during his campaign was based on the notion that undocumented Latino immigrants living in the U.S. were a drain on society and consisted of criminals and rapists. The solution, according to Trump, was construction of a massive wall along the U.S.-Mexico borderlands. Following his inauguration in January 2017, President Donald Trump immediately put into place two significant immigration proposals that included a wall, and deportation of 11 million undocumented Latino immigrants (Los Angeles Times, 2017).

In the aftermath of the U.S.-Mexico War, 1846-1848, the annexation of Mexican territories by the U.S. resulted in a geographical border between Mexico and the United States, and determined the extent to which Mexican people were able to claim rights in the United States (Najera, 2015; Romo & Marquez, 2010). The issues related to immigration, control of the U.S.-Mexico border, and the border communities continue to be contemporary topics of debate (Romo & Marquez, 2010). A recent Pew Research Center study (2017) found that a growing share of Latinos in the U.S. have serious concerns about U.S.-Mexico relations and their place in America. These matters are complex and requires us to view the borderlands as dynamic, social processes (Romo & Marquez, 2010). Subsequently, we would argue that studies of gender on the borderlands are an important areas of research. Scholarship that examines gender on the borderlands, include an array of themes such as: exploring borderlands, racialization, violence, stereotypes, racism, sexism, race/ethnic relations, power inequities, family, migrant struggle, search for identity, intersectionalities of race, ethnicity, class, gender, sexualities, social constructionism, and empowerment. The other notable feature of the study of gender on the borderlands is that this field encompasses works such as poetry, art, songs, oral histories, academic books and essays, testimonies, narratives, and interviews. We found that much of the scholarship written by Latino or other culturally sensitive scholars focused on the legacy of human agency and activism, which is typically absent in mainstream academic literature.

We hope that the articles and books outlined in this paper will be useful for anyone interested in teaching or learning about the study of gender on the borderlands. The articles and books are grouped by year of publication from older to more recent scholarship.
<table>
<thead>
<tr>
<th>References</th>
<th>Key Argument/Abstract</th>
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<tbody>
<tr>
<td>Goldring, L. (2001). <em>The Gender and Geography of Citizenship in Mexico-U.S. Transnational Spaces</em>. <em>Identities: Global Studies in Culture and Power</em> 7: 37-41.</td>
<td>Using data from research on migration between Zacatecas and California, Goldring argues that men find a privileged arena of action in transmigrant organizations and Mexican state-mediated transnational social spaces, which become spaces for practicing forms of citizenship that enhance their social and gender status. Women are excluded from active citizenship in this arena, but often practice substantive social citizenship in the United States.</td>
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the variability, and flexibility of concepts of masculinity and femininity. The key insight of this book is that diverse patterns of gendered meanings can emerge in different maquila factories: assembly plant management use varied and sexualized assumptions about workers to maximize productivity and shop floor discipline.

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<tr>
<th>Marquez R.R. and Padilla, Y.C. (2004). Immigration in the Life Histories of Women Living in the United States-Mexico Border Region. <em>Journal of Immigrant &amp; Refugee Services</em> 2 (1-2): 11-30.</th>
<th>Based on life history interviews and focus groups with women living in two adjoining border cities, Brownsville, Texas and Matamoros, Tamaulipas, the authors observed the trajectories of women at two points of the migration course: (a) migration from the interior of Mexico to the northern border and (b) emigration across the international boundary to the United States. Although they held expectations that migration would improve their lives and the lives of their families, their social and economic integration in the border region met with limited success.</th>
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<td>Description</td>
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<td>Segura, D. and Zavella, P. (Eds.). (2007). <em>Women and Migration in the U.S.-Mexico Borderlands: A Reader</em>. Duke University Press.</td>
<td>Analysis of how economically and politically displaced migrant women assert human agency in everyday life. Scholars across diverse disciplines examine the socioeconomic forces that propel Mexican women into the migrant stream and shape their employment options; the changes that these women are making in homes, families, and communities; and the “structural violence” that they confront in the U.S.-Mexico borderlands.</td>
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<tr>
<td>Broughton, C. (2008) &quot;Migration as engendered practice: Mexican men, masculinity, and northward migration.&quot; <em>Gender &amp; Society</em> 22 (5): 568-589.</td>
<td>For this study the author sampled men in rural areas to get their views of migration and the Mexico-U.S. border. Traditionalists view the border as alluring and dangerous. The Adventurer view takes the position that the border is a place earn money and prove their manhood and skill. The Breadwinner focuses on providing for children. Reluctant and/or unconvinced by what the northern border might offer. This “fluidity” in masculine role is viewed by the authored as shaped in part by neoliberal economic changes in Mexico.</td>
</tr>
<tr>
<td>Mattingly, D. J. and Hansen, E.R., (Eds.) (2008). <em>Women and Change at the U.S.–Mexico Border: Mobility, Labor, and Activism</em>. University of Arizona Press.</td>
<td>The main goal of the books is to showcase the agency of women on the U.S. –Mexico Border. The book engages feminist scholarship and makes a contribution by exploring lives of women and places them at the center of the research. The authors explore the interplay between external forces shaping the lives of women on the border and how women react</td>
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individually or through collective efforts. These diverse articles emphasize a broad range of topics, such as the changing gender composition of the maquiladora workforce over the past decade and border women’s non-governmental organizations and political activism.

<table>
<thead>
<tr>
<th>Author</th>
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<th>Summary</th>
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<tr>
<td>Blackwell, M. (2013).</td>
<td><em>Gender, Activism, and the Border. Aztlan</em> 38(1): 127-139.</td>
<td>The author offers a dossier on gender, activism, on the Mexico-U.S. Border (1987-2012). This article examines topics related to border studies on the U.S.-Mexico border, including art activism, indigeneity, and feminist activism. Some discussion about alternative conceptualization of “the border” are discussed. According to the author the work reviewed looks an alternative form of activist research not covered in previous works.</td>
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<td>Hernández, S. (2014).</td>
<td><em>Working Women into the Borderlands.</em> The University of North Carolina Press.</td>
<td>Hernández examines how women’s labor was shaped by U.S. capital in the northeast region of Mexico and how women’s labor activism simultaneously shaped the nature of foreign investment and relations between Mexicans and Americans. Women laborers were expected to maintain their “proper” place in society, and work environments were in fact gendered and class-based. Yet, these prescribed notions of class and gender were frequently challenged as women sought to improve their livelihoods.</td>
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<td>Staudt, K. (2014).</td>
<td><em>The Border, Performed in Films: Produced in both Mexico and the US to “Bring Out the Worst in a Country.”</em> <em>Journal of Borderlands Studies</em> 29 (4): 465-479.</td>
<td>Drawing on interdisciplinary perspectives, Staudt analyzes the cultural production and “othering” processes of the multiple US–Mexico borderlands film industry. She argues that in both historical and contemporary films, everyday lives in the borderlands are not well represented. The article examines films produced in Mexico and the U.S. The films (1930-</td>
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2012) include dialogue in English and Spanish and taking place at multiple border sites. The author argues that the films explored in this piece seek to challenge the hegemonic stereotypes of the people and lives on the U.S.-Mexico Border.

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<td>In this historical ethnography, Jennifer R. Nájera offers a layered rendering and analysis of Mexican segregation in a South Texas community in the first half of the twentieth century. Using oral histories and local archives, she brings to life Mexican origin peoples' experiences with segregation. Through their stories and supporting documentary evidence, Nájera shows how the ambiguous racial status of Mexican origin people allowed some of them to be exceptions to the rule of Anglo racial dominance.</td>
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<td>Drawing on 80 letters written between 1963-1971, oral histories, and other archival methods, the author explores the relationship between José Chávez Esparza and María Concepción &quot;Conchita&quot; Alvarado in the 1960s. José was a farmworker in the Imperial Valley and his future wife Maria, lived in Calvillo, Aguascalientes. The article explores the world of a male migrant farmworker seeking love and companionship. The author explores rural working conditions, courtship practices, and educational and financial conditions that contribute to the decision to migrate.</td>
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<td>This research focused on indigenous communities and former workers, and collected over 80 oral histories. Loza’s study examines the underexplored aspects of workers' lives--such as their transnational union-organizing efforts, the sexual economies of both hetero and queer workers, and the ethno-racial boundaries among Mexican indigenous braceros. Her work shows how these men defied perceived political, sexual, and racial norms.</td>
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<th>Quintero, G., and A. L. Estrada.</th>
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<td>The authors explore masculinity in drug culture where...</td>
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a hyper masculine front is employed for protect and to negotiate prison settings. Ethnographic interviews with 89 intravenous drug users and seven focus groups were collected. The respondents include 104 men and 25 women ranging in ages from 18-54. Study found that drug use is a way to show fearlessness and is a self-defense mechanism linked to maintaining a particular status and identity.


Stern explores the history of eugenics in the United States and demonstrates how eugenics continues to inform institutional and reproductive injustice. The book includes a chapter on sterilization and quarantine practices of Mexicans living in the twin cities of Laredo-Nuevo Laredo on the Texas-Mexico border during the early 1900’s. She concludes that these early sterilization and quarantine practices were based on racist views embraced by medical professionals in the U.S., and that these views continue to have profound effects for Mexican and Chicano/a communities as well as for current immigration and border control policies.

Bibliography


