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Managing Tax Revenue Volatility

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Abstract

During the initial decade of the twenty first century a number of scholars in the American public administration arena suggested that certain social science methods, particularly those pertaining to portfolio analysis, can play an important role in managing tax revenue volatility. Several discussions involved an adaptation of Modern Portfolio Theory which indicates that investment decisions should be based on the mean-variance characteristics of “portfolios” which are collections of financial assets. This paper contributes to the technical aspect of the dialogue by outlining a procedure which may reduce some tax portfolio analysis complexities when applied to these kinds of revenue decisions.

Introduction

In a September | October 2007 online edition, Public Administration Review (PAR) published an article by Fred Thomson and Bruce L. Gates titled *Betting on the Future with a Cloudy Crystal Ball? Revenue Forecasting, Financial Theory, and Budgets-An expanded Treatment*. The authors’ central research question is “given that we can’t predict the future, how can we get a good result no matter what the economy throws at us” (Thompson and Gates, 2007, p. 48)? Their fundamental answer is that certain modern financial economic theories and social science methods may have much to offer practitioners in terms of managing the volatility often associated with tax revenues. Portfolio analysis is one of four financial tools presented when supporting their position.

The article produced several immediate responses from well-known scholars. PAR has published them in a “Commentator” section of the September | October 2007 online edition. The general consensus might best be summarized with Meyers’ (2007) assertion that at the very least, the article is the type of thought provoking-contribution that will stimulate discussion-some of which will be quite critical from a traditionalist perspective. Those who are interested in moving beyond that lens will find that the article...can apply to public administration theory and practice” (P. 74).

The resistance aspect of Meyers’ declaration is likely to be true as taxation decisions involve revenue politics (Rubin, 2006). However, technocratic contests may also be expected to occur as portfolio analysis challenges existing methodologies and ways of thinking with a mean variance framework which is not necessarily intuitive. Furthermore, the technique requires a certain level of mathematical competence. As Meyers (2007) suggests “to truly understand the authors’ arguments, readers will have to immerse themselves in a finance textbook” (p. 74). Thus one might presume that simplifications and clarifications will be a welcomed addition to the practitioner oriented material presented thus far.

Given the above, this paper contributes to the technical aspect of the dialogue by outlining a procedure which may reduce some tax portfolio analysis complexities. Overall, the progression of the article follows Thompson and Gates (2007) in synthesizing a body of work practitioners may find useful. The next section briefly reviews pertinent research literature before delineating the approach. This is followed by an illustrative example. Additional comments are given in the conclusion section.

Literature Review

While Thompson and Gates’ (2007) article is an excellent conceptual synthesis for practitioners, the notion that portfolio analysis can be used to evaluate tax revenue volatility is not foreign to scholars interested in public budgeting and finance research oriented literature. Garret (2006), for example, employs the technique in a study examining tax revenue variability for a sample of U.S. states. Furthermore, Berg,

Marlin, and Heydarpour (2000) and Mallick and Harmon (1994) use a similar approach when examining New York City and State taxes.

A common feature of the above mentioned works is that Modern Portfolio Theory (MPT) is applied. Introduced by Markowitz (1952) MPT posits that when rational investors confront risk in a financial-economic environment they should focus on moments one and two of a portfolio's return distribution as there is a positive relationship between them that can be mitigated when assets are not perfectly correlated. The first moment, or mean, is defined as expected return. The second moment, or variance, is defined as volatility (or risk). Consequently each of the investigations necessarily adopts Markowitz's assumptions, including normality, and adapts the initial constructs and methods necessary for finding objectively efficient tax portfolios.

By way of extension, objectively efficient tax portfolios are defined as mixes of components which minimize volatility for an expected percent change in revenue or that maximize the expected percent change in revenue for a given level of volatility. Mathematically sets of efficient tax portfolios can be determined by finding solutions for the following optimization problem:

$$(1) \quad \begin{aligned} &\text{minimize } \sigma_p^2 = \sum_{i=1}^n \sum_{j=1}^n \omega_i \omega_j \sigma_{ij} \\ &\text{subject to } E(R_p) = \sum_{i=1}^n \omega_i r_i; \text{ and} \\ &\quad \sum_{i=1}^n \omega_i = 1; \text{ and} \\ &\quad \omega_i \geq 0 \end{aligned}$$

where:

- σ_p^2 = Variance of percentage change in revenue for a tax portfolio;
- $E(R_p)$ = Expected percent change in revenue for a tax portfolio;
- n = Total number of tax components;
- σ_{ij} = Covariance of tax components i and j ;
- r_i = Expected percent change in revenue for tax component i ; and
- ω_i = Tax component i 's share of total tax revenue.

As expected, empirical studies typically rely on historical observations for a predetermined time period. Some (e.g., Garrett, 2006) concentrate on finding a minimum variance portfolio(s) by setting the first derivative of σ_p^2 with respect to ω_i equal to zero. Most of the researchers cited above, however, portray solutions in a two dimensional space.

A generalized result is portrayed in Figure 1 under the assumption that tax components are not perfectly correlated. The central insight is that "AB" is a frontier which reveals the expected outcomes associated with all objectively efficient tax portfolios. By comparison, tax portfolio "C" is not efficient as superior mixes exist. Portfolio A, for example, affords an identical expected percent change in revenue with much less volatility. Portfolio B, by comparison, affords a greater expected percent change in revenue with the same volatility.

[See Figure 1]

What is not completely clear is which efficient tax mix should be chosen. Berg et al. (2000) essentially answer the query by holding $E(R_p)$ constant for New York City. Of course this requires adjusting the existing mix of components (ω_i) so that a tax portfolio such as "A" in Figure 1 is achieved. Naturally the intention is to reduce σ_p^2 for a target $E(R_p)$ that presumably is in-line with the subjective preferences of

the government. The conclusion is similar to that given in Garret (2006) if “A” is defined as the minimum variance tax portfolio. However, such a presumption may not always be correct.

Traditional financial economic analyses often incorporate subjective utility functions for risk-averse investors when answering such queries. Khan (2002) does this in a portfolio analysis that theoretically addresses Key’s (1940) expenditure side question “on what basis shall it be decided to allocate x dollars to activity A instead of activity B?” (p. 1138). Unfortunately, from the public practitioner’s point of view, computational complexities make the approach extremely problematic for even the simplest of cases (e.g., a tax portfolio with two components). Therefore methodological simplifications may be worth exploring if portfolio analysis is to become an accepted fiscal tool that is successfully implemented.

Methodology

One possible simplification can be found in Williams’ (1997) work which focuses on maximizing the likelihood of achieving an investment goal. Unlike Khan (2002) his primary contention is that probability is an appropriate measure of volatility that is consistent with risk averse-behavior and easier to work with. While not explicitly stated his probabilistic logic is rooted in Leibowitz and Henriksson’s (1989) efforts which demonstrate that portfolio optimization can incorporate shortfall constraints that highlighted downside risk.

Much of Williams’ article addresses econometric time series concerns but the central insight can be gleaned here by noting the following two points while referencing efficient tax portfolios A and B in Figure 1:

1. When considering tax portfolio A, $E(R_A)$ and $E(R_B)$ are values contained in tax portfolio A’s distribution of percent changes in revenue. While the probability that $E(R_A)$ will be realized or exceeded is fifty-percent, the probability that $E(R_B)$ will be realized or exceeded is less than fifty-percent.
2. When considering tax portfolio B, $E(R_B)$ and $E(R_A)$ are values contained in tax portfolio B’s distribution of percent changes in revenue. While the probability that $E(R_B)$ will be realized or exceeded is fifty-percent, the probability that $E(R_A)$ will be realized or exceeded is greater than fifty-percent.

Both points are based on known aspects of normal distributions and can be generalized to the entire efficient frontier. Consequently $E(R_A)$ and $E(R_B)$ are just two potential targets that a decision maker can choose to pursue in a variety of ways via tax mixes that are objectively efficient. Using this information the following three steps suggest a straightforward administrative procedure for incorporating subjective choice:

1. Choose a target value (R_T) for the percent change in revenue.
2. Calculate $Z = [R_T - E(R_p)] \div \sqrt{\sigma_p^2}$ for every tax portfolio on the efficient frontier.
3. Use each Z score in conjunction with a standardized table to calculate the probability that the percent change in revenue will be greater than or equal to R_T .

The final step is to choose the efficient tax portfolio with an acceptable probability of equaling or exceeding R_T .

Illustrative Results

The computations discussed above may appear complicated. However, certain technologies are available to alleviate most of these concerns. To illustrate, the information in Panel A of Table 1 is used to construct Figure 2 with various functions that are available in the Microsoft Excel spreadsheet. The data come from Berg et al.’s (2000) empirical study concerning New York City’s tax mix and can be found in the third table of their publication.⁵

With some exceptions Panel A of Figure 2 essentially replicates the efficient frontier provided by these researchers. One modification is that the horizontal axis replaces their volatility measure, σ_p^2 , with σ_p as

the latter computation is more useful for a probability oriented discussion. By comparison, Panel B presents probability frontiers for three ad hoc target values: 4%, 5.5%, and 6.5%.

[See Table 1 and Figure 2]

An important point to note is that the positions of the frontiers in the two dimensional space are consistent with intuition. For example, the frontier corresponding to $R_T = 4\%$ lies above $R_T = 5.5\%$ and $R_T = 6.5\%$. This should be expected given that the probability of equaling or exceeding a lower target value should be higher than the probability of equaling or exceeding a higher target value. Panel B of Table 2 supplements this conclusion with probability estimates for the least and most volatile tax portfolios reported in the Berg et al (2000) study.

Conclusion

Overall, portfolio analysis (e.g., MPT) seems to be an important investment tool that may also be appropriate for managing the volatility often associated with tax revenues. Conceptually and empirically the connection hinges on the positive relationship between the first and second moments for an expected distribution of percentage rate changes. Another link resides in the notion of covariance and the possibility of volatility (i.e., risk) reduction with sufficient diversification. With respect to this simplification oriented paper, however, one major clarification is in order as equity is not addressed.

Obviously fairness is an important aspect of tax policy analysis and this should be employed during the course of any investigation. The mean-variance and probability models discussed here are both capable of handling such concerns by means of imposing additional constraints on any specific tax component's share of total tax revenue. In either case, such constraints are likely to a) increase the volatility for a given level of expected percent change in revenue, or b) decrease the level of expected percent change in revenue for a given level of volatility.

Other potential concerns include issues surrounding normality and the fact that volatility can be reduced through ways other than tax mixes. These are not considered here as they are not specifically tied to the purpose at hand.

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Figure 1
Hypothetical Efficient Frontier

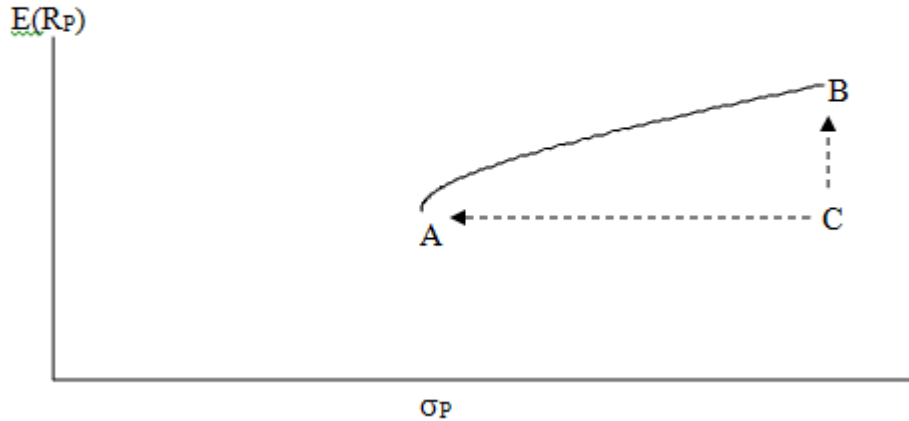


Table 1
Empirical Probability Frontiers Based on Berg et al. (2000)

Tax Portfolio	Least Volatile	Most Volatile
Panel A		
Revenue Component		
Business%	1.00	0.00
Personal Income%	0.00	100
Property%	43.40	0.00
Sales%	55.60	0.00
Outcomes		
$E(R_p)$ [%]	.039	0.069
σ_p [% age points]	.298	0.625
Panel B		
Probability $E(R_p) \geq E(R_T)$		
$E(R_T) = 4.0\%$	49.93%	51.85%
$E(R_T) = 5.50\%$	47.92%	50.89%
$E(R_T) = 6.50\%$	46.59%	50.26%

Note. Both the least and most volatile portfolios are on Berg et al.'s (2000) efficient frontier. Thus any linear combination of them is also efficient. The information in Panel A is used to deduce that the correlation coefficient is approximately equal to 0.48.

Figure 2
Panel A: Empirical Efficient Frontier

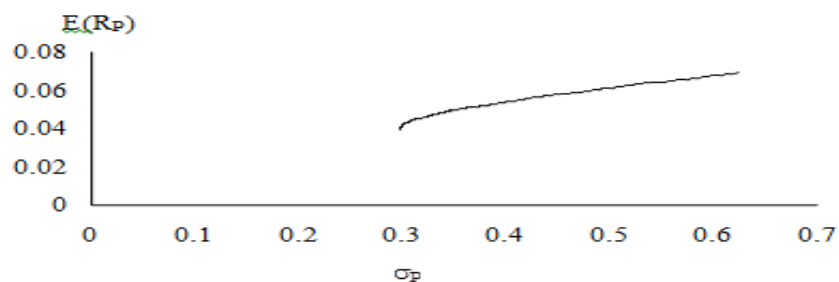
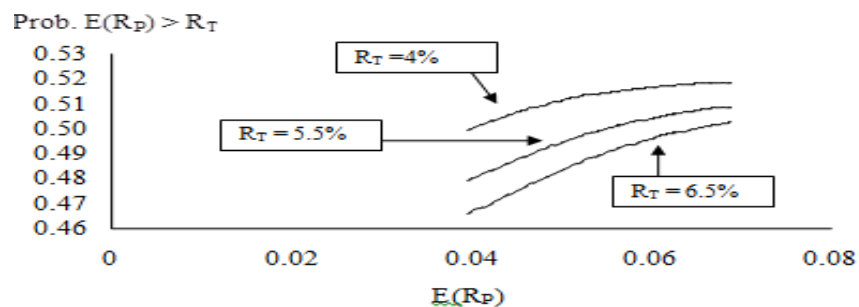


Figure 2
Panel B: Empirical Efficient Frontier



SWOSU Serves: An Integration of Service-Learning

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Abstract

This article presents the findings of a study integrating service-learning into a freshman orientation course at a regional university. The purpose of the service-learning experience was to introduce university students to the concept of service learning while also promoting a sense of belonging among the participants. Participants engaged in critical reflection as a means of analyzing and processing their experience. Prior to the one-time service-learning event, participants completed a written pre-reflection exercise. Upon completion of their day of service, participants completed a written post-reflection exercise. Results indicated that participants felt confident prior to their service-learning experience, citing their positive attitudes and strong work ethic as preparation for the experience. Upon completion of the service-learning project, participants stated that they learned to be more collaborative in the process and that they also learned of their satisfaction in helping others. When asked how the experience might change their future behavior, participants indicated that they were inspired to engage in future opportunities of service and noted increased feelings of gratitude. Questions raised for future research include replicating the study with future freshmen cohorts and tracking future service-learning engagement in other university courses.

Introduction

Service-learning is a form of community engagement that may be used as a pedagogical strategy, engaging students in a participative learning experience in order to address a community need. The philosophy of service-learning is embraced by many institutions, including institutions of higher education. Campus Compact, a national coalition of colleges and universities, provides guidance to campuses to effectively integrate service-learning into the curriculum (Jacoby, 2015). A popular definition of service-learning is attributed to Jacoby (2015) who defines it, “as a form of experiential education in which students engage in activities that address human and community needs, together with structured opportunities for reflection designed to achieve desired learning outcomes” (p. 2).

Theoretical Framework

Dewey’s (1933) learning theory, incorporating critical reflection, provides the theoretical framework for this study, defined as “the active, persistent, and careful consideration of any belief or supposed form of knowledge in the light of the grounds that support it and the further conclusions to which it tends” (p. 9). Critical reflection allows students to consider their experiences in the context of self-inspection, consideration, analysis, and evaluation. Jacoby (2015) emphasizes, “Experience without critical reflection can all too easily allow students to reinforce their stereotypes about people who are different from themselves, develop simplistic solutions to complex problems, and generalize inaccurately based on limited data” (p. 26).

Literature Review

The foundation of American educational philosophy is often attributed to John Dewey as the belief that education is “a process of continuous reconstruction of experience with the purpose of widening and deepening its social content” (as cited in Winn, 2015, p. 37). Dewey further elaborates on this social content and the development of societal similarities as “all the ways in which by associating together men share their experiences, and build up common interests and aims...[it] is either an abstract or a collective noun”

(as cited in Winn, 2015, p. 130). Universities have long sought to provide supportive environments that encourage students to build upon the collective noun by establishing common interests with their peers in order to foster student retention and success. Tinto's (1987, 1993) research on social integration suggests that universities foster informal connections among students so that they might develop a sense of belonging with campus peers. Tinto stated, "Incongruence with one's student peers proves to be a particularly important element in voluntary departure" (as cited in Simonet, 2008, p. 7).

It is important to understand how research corroborates the positive correlation between service-learning opportunities and university student retention. Service-learning, embedded within course curriculum, enables students to use their classroom experiences to build relationships with individuals both on and off campus. "The development of interpersonal relationships – in and out of the classroom – is important because it is against this backdrop of a supportive network of peers that other academic support mechanisms can begin to operate" (Simonet, 2008, p. 7). First-year seminar or gateway courses are often used "to introduce students to the concept of service-learning, the community in which the university is located, and how students can build skills in writing, critical thinking, and a content area through experiential learning" (Jacoby, 2015, p. 91). This philosophy provided the impetus for this research study; SWOSU Serves was implemented as a single day of service, imbedded in the Freshmen Orientation course.

Method

This research study consisted of qualitative inquiry and was implemented using a case study approach. The participants consisted of a random sample of 48 undergraduate students enrolled in a one-credit hour freshmen orientation course during the fall 2018 semester. This purposeful sample was appropriate, as it was selected for information-rich purposes (Patton, 2002). Embedded within the course curriculum was a one-time service learning event, common among colleges and universities. As Jacoby (2015) states, "...service days can provide opportunities for new students to meet one another and to begin the process of building a community, familiarize themselves with the community in which the campus is located...and become interested in further service-learning" (p. 130).

Data Collection

The strategic framework of critical reflection provides the foundation for this study. Therefore, Jacoby's (2015) steps for designing and implementing critical reflection opportunities were utilized: "1) state learning outcomes; 2) introduce the concept and practice of critical reflection; 3) design a reflection strategy to achieve the learning outcomes; 4) engage the students; 5) assess learning through critical reflection" (p. 31-40).

The course syllabus incorporated language from the American Association of Colleges and Universities (AACU) to state student learner outcomes. Two course outcomes stated: 1) *Students will engage in service-learning activity and reflection in order to develop a better understanding of the SWOSU/Weatherford community* and 2) *Students will describe what they have learned about themselves as it relates to a growing sense of civic identity* (AACU, 2009). In order to introduce the concept and practice of critical reflection, students were provided with rubrics to guide their reflective writing. "Providing rubrics that concretely describe critical reflection...are helpful to students" (Jacoby, 2015, p. 32). The design of the reflective strategy included a written pre-flection, followed by engagement in the service-learning project, and a written post-flection; this methodology follows Jacoby's counsel that "an effective strategy should combine several reflection modes and should be continuous, connected, challenging, and contextualized" (p. 32).

Results

Written Pre-flection

Prior to the service-learning event, students completed a pre-flection. The pre-flection was in the form of a discussion board post on the Canvas Learning Management System. The pre-flection prompt consisted of the following questions: 1) *What do you bring (skills, attitudes, values) to a service-learning activity?* 2) *Have you ever participated in a service-learning activity? If yes, how did the experience make you feel?*

Table 1 indicates that students were quick to identify a positive attitude as a personal attribute that would contribute to the service-learning activity; thirty participants echoed this statement. "The best thing that I can bring is a positive attitude. The attitude that you show up with determines the outcome of your

entire experience” (Student JL). Student DP also responded, “I am going to work hard and have a good attitude about it, because that is how I was raised and just how I work.”

Twelve students discussed the second most identified personal attribute, a strong work ethic. “One good skill of mine is I have a good work ethic. No matter what I’m doing, I try to do it the best I can” (Student MG). Another student stated, “I bring a good work ethic and a can-do attitude to this weekend’s service-learning project” (Student RH).

Fifty-six percent of the student participants had participated in a service-learning opportunity previously. When asked how that experience made them feel, the top three responses included increased positive attitudes, satisfaction in helping others, and further development of their personal work ethic (see Table 2). “I love the feeling of knowing I helped someone” (Student KG), “I love doing service projects because it makes me feel like I’m helping the community as best I can” (Student KQ) and “I felt good about helping others” (Student CB) are examples of student responses. Regarding the development of their personal work ethic, participants stated, “I think I learned to have a good work ethic and how that helps to be active in the community” (Student MP) and “The experience left me feeling somewhat accomplished, that if I work hard, I can learn a little bit about general handiness and how to work quickly” (Student CT).

Written Post-Reflection

Following the service-learning event, participants completed a written post-reflection post on the Canvas Learning Management System. After describing their service-learning experience, the post-reflection prompt asked participants the following questions: 1) *How have you changed as a result of this service-learning experience?* 2) *How will these changes affect your future behaviors?*

The top responses of how participants felt they had changed as a result of the service-learning experience included feelings of being more collaborative and discovering enjoyment in helping others (see Table 3). One participant stated, “I’ve never been much for crowds, but we all managed to work together really well and enjoyed our time while doing it” (Student KB). Others stated, “The thing I liked most about this project was working with my classmates and some friends” (Student KC) and “[This] will allow me to work better in the groups in the future” (Student HU). Regarding helping others, Student KG reflected, “The best thing about this experience would easily be seeing the smiles on the kids’ faces throughout the day.” Student KH wrote, “I really enjoyed being able to lend a helping hand and getting to meet all of the amazing people.”

Table 4 outlines participants’ responses to how these changes in self might affect their future behaviors. The majority of participants said they felt inspired to increase their amount of community service in the future. Student CM stated, “It gives me reasons to not deny [myself] other opportunities because I ‘haven’t done it before.’” Other students affirmed the thought, adding, “These changes will make me a nicer person and someone who will help out the community” (Student BS) and “I will probably be more open to finding avenues for service within university organizations because of my time with SWOSU Serves” (Student KB).

Discussion

The participants in this study engaged in a structured service-learning opportunity during a university freshmen orientation course. As part of the structure, participants were asked to complete a written pre-reflection exercise in which they addressed the following questions: 1) *What do you bring (skills, attitudes, values) to a service-learning activity?* 2) *Have you ever participated in a service-learning activity? If yes, how did the experience make you feel?* After completing the one-time service learning day, entitled SWOSU Serves after the regional institution at which they were enrolled, students also completed a written post-reflection exercise, addressing these questions: 1) *How have you changed as a result of this service-learning experience?* 2) *How will these changes affect your future behaviors?*

Participants’ responses indicated a level of comfort that their good attitude and work ethic would enable them to successfully complete their service-learning experience. These feelings of well-being may be attributed to the percentage of students who had participated in previous service-learning (56%) and the determination that students’ personal outcomes are enhanced by service-learning experiences (Jacoby, 2015). Of the participants who had previously participated in a service-learning activity, feelings of developing a more positive attitude and finding satisfaction in helping others dominated the responses.

These feelings correlate to Jacoby's (2015) findings that students "gain a deeper understanding of the complexity of social issues and are more connected to their communities" (p. 12) and Simonet's (2008) findings that "service-learning can build students' resiliency by improving their interactions with others, strengthening their character" (p. 6).

Upon completion of the day of service, participants identified two primary ways that they had experienced change within themselves. The attribute most commonly mentioned was becoming more collaborative in nature. Student JH stated, "The thing I loved the most was the companionship. I met a lot of nice girls and we were very social throughout the whole volunteering process." Student MM summarized it well, "It made me realize how much a small group of people working together can impact a whole community." From a university's perspective, these statements are a positive indication of how service-learning assists students with developing a sense of belonging, as evidenced by Simone's (2008) observation that "students must feel vitally connected to their cohort group in order to feel socially integrated...students are more likely to withdraw when they are not yet vitally connected to a group" (p. 7). The second most recognized area of growth was in participants' finding enjoyment in helping others. Participants commented, "I think that in the future I would like to volunteer and help others more because it was very enlightening and it made me happy to help others out" (Student JM) and "my future behavior will be to help others for the greater good" (Student CB).

When viewed through Dewey's (1933) lens of educational reflection, a concept that frees students from the inhibiting influence of tradition, perhaps the most important question was the one on which students last reflected: *How will these changes affect your future behaviors?* Students responded that they would be inspired to do more community service; this outcome is not surprising given their previous statements of finding joy in helping others. However, participants also stated that in the future they would express more gratitude as a result of their service-learning experience. Individual responses were revealing, "I'll be more mindful" (Student DB); "We are provided with so much [on this campus]. I think from here on out I'll be more grateful for it all" (Student LW); and "Overall it was a humbling experience and I am glad that I went" (Student KM). This emotional engagement, "relates to greater meaning by establishing stronger attachments and bonds" (Simonet, 2009, p. 3); it indicates a positive measure of the stated student learner outcome, since students described what they learned about themselves as it relates to a growing sense of civic identity.

Future Research

Future plans for this research will be to replicate this study of service-learning with the fall 2019 freshmen cohort. Additionally, retention rates of the study cohort will be monitored in order to determine if service-learning outcomes, when engaged in early in a university experience, positively correlate to increase retention. The university will also begin to collect enrollment data on future service-learning course offerings.

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Appendix

Table 1. Preflection: What do you bring to the S-L activity?

Skills, Attitudes, Values (Top Reponses)
Attitude
Work ethic
Helpfulness
Communication skills

Table 2. Pre-flection: How did your previous S-L activity make you feel?

Feelings (Top Reponses)
Positive attitude developed
Satisfaction in helping others
Developed stronger work ethic
Understanding of teamwork

Table 3. Post-flection: How have you changed as a result of this S-L experience?

Responses (Top Reponses)
More collaborative
Enjoyment in helping others
Increased respect for others
More appreciation for peers

Table 4. Post-flection: How will these changes affect your future behaviors?

Responses (Top Reponses)
Inspired to do more community service
Express more gratitude
Improved attitude
Willingness to try new things

Casing Decades of Electoral Reform: 2020, COVID 19 and Rank Choice Vote

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Twenty years seems like a long time, yet "Florida 2000" was THE point at which electoral reform became a household agenda. In the decades since then each election has compounded problems with the election processes while the debate rages on about electoral reform. After each election a variety of electoral reforms have been implemented across U.S. cities yet each have frustrated voters leading to lessened turnout, confidence and fatigue in the system. This study analyzes the decades of electoral issues across the nation and the electoral reform efforts after each election. It then analyzes the most recent electoral reform effort called rank choice vote (RCV) that is being used successfully in nineteen citiesⁱ, one state, Maine and despite COVID used in four 2020 democratic primariesⁱⁱ.

Florida 2000: During the 2000 election, while Gore had won the popular vote by roughly a half-million ballots. Yet as the vote count in Florida had not been determined whoever won Florida would be the next president. The morning after the election the Florida secretary of state, Harris, announced that Bush had won Florida which would mean that he would be president. However, Bush's margin was so small, a margin of just 537 votes out of six-million cast (Hasen, 2005), that the minuscule margin of this election ballooned into a national controversy. The controversies continued as Harris was also an ally of the nominee's brother, Gov. Bush, and had been co-chair of the nominee's statewide campaign causing the Democrats to sue for a recount.

What followed was a five-week war with both sides facing off over the ballot design, recounts, the rules, and the law. While the Democrats lost in the state's circuit court, that decision was reversed by the Florida Supreme Court with the ruling appealed to the U.S. Supreme Court. Thirty six days later in a 5-4 vote the Supreme Court ruled that since a recount could not be established in a timely manner, Bush was president. Yet, the controversy surrounding this unprecedented election and its aftermath did not end there.

Post 2000 election: The election sparked a national debate on the country's election system. Immediately issues surrounding the design of the ballot were called into question as these confused voters such that those casting ballots for Gore had in actuality cast them for third-party candidate Patrick Buchanan. Other issues ensued about the punch card ballot and what constituted as a vote. Was a vote counted if there was a hanging chad, where the chad was attached to the ballot at only one corner? Or a swinging chad where it was attached to the ballot at two corners? Or a pregnant chad which was attached to the ballot at all four corners? The accuracy of the hand counting process also fell under scrutiny and questions about the equipment correctly registering the vote count along with the rules on how to recount were brought to light.

Additional attention was brought to bear about the large number of African American voters who had been purged from registration lists as well as the two to three million people had lost their right to vote due to clerical and administrative errors. Questions also arose about Harris's partisanship as she certified the results.

In reaction to the election, Congress established a bipartisan select task force on election procedures, standards, and technology finding that there were indeed differences in voting procedures and voting technologies in the 2000 election resulting in disadvantaging an estimated 14.4 percent of Florida's black voters whose votes were rejected during the election (Overton, 2001). The commission also found that African American voters were placed on purge lists more often and more

erroneously than Hispanic or white voters (Hansen, 2012). They also found that voting systems, with higher spoilage rates, were found in poor minority population districts that were in the affluent counties (Hansen, 2012).

Congress ultimately passed a comprehensive measure, the Help America Vote Act (HAVA) which created new mandatory minimum standards for states to follow while providing states with assistance and money to modernize voting equipment (Palazzolo et al., 2008). HAVA also established the election assistance commission (EAC) which created voting system guidelines, maintained the national voter registration form, and administered a national clearinghouse on elections that included shared practices, information for voters and other resources to improve elections (Palazzolo et al., 2008).

States used HAVA funding to improve voting machines, registration databases, voter education, poll worker training, provisional voting and independent voting by the disabled (Mann, 2001). With HAVA in place and the states improving their systems was the nation ready for the next election? Could another Florida happen? The election of 2000 was in the forefront during the 2004 election.

The 2004 election: The 2004 election between President Bush and Democratic nominee Kerry was yet another election with an undetermined winner election night. The morning after it was revealed that Bush and Kerry were neck and neck, yet Ohio, New Mexico, and Iowa had still not decided the winner and over 200,000 provisional ballots had yet to be counted (Holbrook, et. al. 2005). If Kerry could win these three states there would be a tie in the Electoral College and as Republicans controlled the House Bush would be the likely winner. The day after the election Ohio's Secretary of State, Blackwell, announced that it was statistically impossible for the Democrats to make up enough valid votes in the provisional ballots to win and Kerry conceded defeat. The election resulted with Bush winning by a slim margin, 50.7% to Kerry's 48.27%.

Post 2004 election, the Ensuring controversies: Controversies similar to those in the 2000 election ensued. Complaints ensued from individuals who had received letters from the board of elections telling them that their registration was invalid. Still, other charges were reported by the Chicago Tribune report that cited several registered voter's names also appeared in a social security database of death claims (Argersinger, 2004). Likewise, a New York Daily News article alleged that 46,000 people were registered to vote in both New York City and Florida (Fund et al., 2012). Charges of voter suppression gained ground (Panagopoulos, & Bergan, 2006) as well as other accusations that the approximately 100,000 registered voters that had been improperly purged in 2000 as "false positives" (not actually felons) and had not been restored by the 2004 election (Dao et al., 2004).

Additional controversies continued about the voting equipment manufacturer's CEO, Walden O'Dell, who was an active fundraiser for Bush's re-election campaign and had promised to deliver Ohio's votes to the president (Freeman, & Bleifuss, 2011). Other allegations of partisanship in elections followed as Blackwell served as the Ohio secretary of state while simultaneously serving as the co-chair of the 2004 Republican Presidential Campaign, similar to the partisanship of Florida secretary of state republican Harris during the 2000 election. Likewise, republican Senator Hagel was on Bush's short list of vice-presidential candidates and served as the chairman of ES&S, the same voting machines that tabulated eighty-five percent of the votes cast during the 2004 election (Harris & Allen, 2004).

The debate continued as the 2004 election victory margin was also the closest popular margin ever for a sitting president with Bush having received 2.5% more than Kerry (Campbell, 2005). The percentage was the smallest of any sitting president since Harry S. Truman's election in 1948 (Brands, 2014). The election also marked the only time when a president lost the popular vote in the preceding election while his political party increased its numbers in both chambers of Congress (Brands, 2014). The environment was tense and disgruntled voters continued questioning the integrity of elections.

With two back to back elections that provided similar electoral issues the states were quick to respond with a series of bills to reform elections. Thirty-five states and the District of Columbia passed early voting laws that permitted voters to cast their ballots in person before Election Day as shown in Table 1 (Underhill, 2012). In addition, eighteen states passed voter ID laws while permitting voters to cast their ballot without an ID if they signed an affidavit or had an election worker vouch for them. While five states allowed voters without an ID to use a provisional ballot which were not counted until the voter showed proof of identity within a few days after the election (Palazzolo & Moscardelli,

2006). And yet another majority of the states passed laws permitting voters to vote by mail while still other states allow voters to vote by mail but do not preclude in-person voting opportunities on and/or before Election Day, each state reform as shown in the same Table 1.

Other reform efforts were taken on by the states. Approximately a fourth of the states changed their registration laws to allow residents to register online (Underhill, 2012), while approximately half the states enacted same day registration (SDR). While other reform efforts ranging from modernizing the voting equipmentⁱⁱⁱ, their databases^{iv}, registration^v, Ballot design, counting procedures, voter education and financial support for machines, poll worker training, and voter education^{vi} were passed in 81% of the states.

The 2008 election: Voters approached the 2008 elections with trepidation about registration, ballot design, counting concerns with additional concerns that the U.S. election system had been hacked.

Post 2008: the aftermath: Unfortunately, the 2008 election validated voters' feelings as reports unfolded throughout Election Day about the long lines to vote that discouraged up to 2.6 million people from voting (Spencer & Markovits, 2010) and that racial disparities existed as lines were longer for Black Americans, Hispanics, Asian Americans and Native Americans than for Whites (Stewart, 2009). Identical to prior elections, there were reports of voting machines malfunctioning (Alvarez et al., 2008), reports about misleading robocalls, voter suppression and intimidation and voters being told their names had been purged from the voter rolls (Hasen, 2012).

Other issues were reported concerning the newly passed state laws on registration, voter ID, and absentee ballot rules. Approximately four-million to five-million voters did not cast a ballot due to registration problems that ran the gamut from officials incorrectly entering voter information in statewide databases to voters who changed their address but failed to inform election officials (Urbina, 2009). There were racial disparity issues with the newly passed voter ID laws as well with a reported 70% of African Americans, 65% of Hispanics, and 51% of Whites asked to show IDs (Alvarez et al., 2008). Ballots for the military had been delayed despite state reforms concerning absentee ballots for military personnel. Those that had failed to receive absentee ballots were approximately the same number of voters who encountered such problems in the 2000 election (Urbina, 2009).

Post 2008 election polls found that more than 40 % of those surveyed were not confident their votes would be accurately cast and counted (Kropf & Kimball, 2013). The voting system was in disrepair from the state reformists' perspective and all the while parties continued to accuse each other of voter disenfranchisement.

The 2012 election: Unremarkably, the 2012 election race between Obama and Mitt Romney furthered the partisanship dividewell before the election began. Yet, an unconsidered factor that year was the enormous surge of online digital video hosting and sharing of sources that had become increasingly popular which affected public opinions and perspectives about the race acting as a proxy on public opinion and the outcome of the election. The race resulted in Obama winning 51.1% of the popular vote and 332 of the 538 electoral votes defeating Republican nominee Mitt Romney.

Post 2012: Once again, the 2012 elections led to a sizable number of concerns about electronic voting-machine jams, breakdowns, and glitches that strewn across the country and created long lines when machines simply broke down. The scenario was like a political version of ground hog day. Reportedly, voters waited for up to six or seven hours to vote and a resultant 500,000 to 700,000 votes were lost due to the long lines (Stewart, 2012). The long lines were yet again in predominantly African American precincts fueling racial concerns (Hasen, 2012). Unsurprisingly, lengthy wait lines made voters less confident that their votes were counted as intended. As the long lines were an effect of new voter ID laws, the intended effect of voter ID laws were called into question since those voters who waited the longest in 2008 waited the longest to vote in 2012 as well.

The highly partisan voter ID laws further fueled voter concerns as charges were brought to bear about the misallocation in voting machines throughout the jurisdictions, followed by concerns about cutbacks in early voting periods and limits on voting by felons who have been freed from prison (Minnite, 2013). Repeatedly, voting equipment malfunctioned and security issues from electronic voting machines were called into question throughout the country as were concerns about hacking. Issues of voter purges and registration issues came to light as well. Moreover, there were various reports of robo-calls and misleading flyers that spread false information regarding elections and voting qualifications (Hasen, 2012).

The 2016 election: Ahead of the 2016 election between Clinton and Trump, claims began emerging that the elections were rigged, voter registration databases were hacked, and out-of-date technology and insufficient resources were being used for the election season. The 2016 election resulted in favor of Trump with 304 electoral votes against Clinton's 227 votes and the claims made prior to the election began to unfold.

Post 2016 aftermath: Post-election surveys indicated that long lines at the polls depressed turnout and that in fact voters in Cincinnati and Georgia collapsed in these long wait lines (Famighetti, 2016). There were reports of equipment malfunctions and vote flipping throughout the day (Sances, 2019). Broken ballot scanner issues were brought to light in New York causing delays and complaints from voters. Improperly coded memory cards in Washington County, Utah led three-quarters of all the machines to break down (Famighetti, 2016). Poor calibration in voting equipment was reported in several states causing voter distrust (Fund, 2012; Sances, 2019). Vote flipping was reported on touchscreen direct recording electronic DRE machines, with the additional claim that Clinton would have won the Electoral College by three votes if vote flipping had not occurred (Sances, 2019).

In addition, while thirty states had changed voter ID laws in response to the 2000 election, these laws remained controversial as widespread confusion among voters and officials kept some citizens from voting (Hasen, 2012; Wood, 2016). One of the most contentious examples came from Texas where the strictest photo ID requirement was found illegal by a federal court on the basis that it was discriminatory (Famighetti, 2016). While states such as Wisconsin had voter ID requirements, these requirements were so problematic for officials that they blocked voters from obtaining documents allowing them to vote. Conversely, states that did not have voter ID laws, improperly insisted that voters provide ID (Wood, 2016). Other issues were brought to bear based on those that affected the nation's felony disenfranchisement laws as several citizens with past convictions did not even know that they could vote. Others were told that they were ineligible (Uggen et al., 2016) while still others reported going to the polling place four times before they voting.

2020 elections and COVID 19: Voting system Reform? Indisputably, the voting system and its procedures have been controversial ever since the Florida 2000 election and it is unsurprising that there is widespread calls for electoral reform. Yet unlike the reform efforts of the past reacting to voter ID, registration issues and long lines, the current reform effort, RCV restructures the entire electoral system from the ballot, the equipment, to the counting of votes one that is currently used in nineteen cities, by the state of Maine for its U.S. congressional seats, and in four 2020 democratic primaries.

Post analysis RCV use in the U.S.: Post election surveys from cities that use RCV finds that voter turnout has surpassed expectations in electoral turnout altering the poor turnout over the past two decades (Endersby & Towle, 2014). Additional surveys note that despite the redesigned ballot where voters had to rank order their preference of candidates, a large majority (85%) of voters found RCV very simple to use and strongly supported their continued use (Chadha, 2019). In fact, nearly half a million voters ranked their choices during their elections in the first half of year 2018 as well as in each of the 24 ranked choice voting elections held in 2014 where over 99% of voters cast a valid ballot (Reilly, 2002).

Other data driven studies found that voters appreciated that the newer system created fairer representation in that historically under-represented groups ran and won office (Chadha, 2019). And that election administrators found that implementing RCV was not costly and run efficiently (Richie, 2017) unlike the structural issues from the past decades. With COVID 19 affecting our 2020 elections the outcomes so far show that RCV has provided electoral reform, reinvigorated voter choice, candidate civility, fairer representation and increased voter turnout, turning the tide from the past two decades of elections that had stymied our electoral process.

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Table 1	
Electoral reform by state	
States with Early voting laws	Alaska, Arizona, Arkansas, California, Delaware, District of Columbia, Florida, Georgia, Hawaii, Idaho, Illinois, Indiana, Iowa, Kansas, Louisiana, Maine, Maryland, Michigan, Massachusetts, Minnesota, Montana, Nebraska, Nevada, New Jersey, New Mexico, New York, North Carolina, North Dakota, Ohio, Oklahoma, South Dakota, Tennessee, Texas, Utah, Vermont, Virginia, West Virginia, Wisconsin, Wyoming
States with Voter ID laws	Georgia, Indiana, Kansas, Mississippi, North Carolina, Tennessee, Virginia, Wisconsin, Arkansas, Alabama, Florida, Hawaii, Idaho, Louisiana, Michigan, Rhode Island, South Dakota, and Texas.
States with Vote by mail	Oregon, Washington and Colorado
States Allowing provisional ballots without ID	Georgia, Indiana, Kansas, Pennsylvania and Tennessee

ⁱ Basalt, Telluride, Carbondale, CO; Berkeley, San Leandro, Oakland, and San Francisco, CA; Cambridge, MA; Minneapolis and St. Paul, St. Louis Park, MN; Portland, ME; Takoma Park, MD; and Burlington, VT., Eastpointe, MI, Santa Fe and Las Cruces, MN, Payson, Vineyard, UT, Portland, ME.

ⁱⁱ Alaska, Hawaii, Kansas, Wyoming

ⁱⁱⁱ Florida, Idaho, Texas, and Utah

^{iv} Florida, Idaho, Texas, and Utah

^v Colorado, Indiana, Kansas, South Dakota, Texas, Georgia, Maryland and Virginia

^{vi} Georgia and Maryland; Maine, Nevada, Ohio, and Virginia

C.S.I.: COLOMBIA: TESTING THE CONCEPT OF THE C.S.I. EFFECT IN LATIN AMERICA

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Abstract:

While the idea of the C.S.I. Effect—the hypothesis that watching forensic based programs influences jurors to substitute their own knowledge of scientific evidence for that of expert testimony and thus make conviction less likely—is receiving growing attention, very little research has been undertaken outside of the United States and none in Latin America. Even though the traditional jury trials have not been a historical norm in Latin America, they are becoming a more common part of the criminal justice process in nations such as Colombia and Mexico. If the C.S.I. hypothesis holds true, it should cross national boundaries. Using a sample of juror age adults, this paper explores what, if any, effect the viewing of forensic television programs may have on potential jurors in Colombia. Results suggest that viewing such programs has little effect on viewer attitudes toward forensic evidence. Future research directions are also discussed.

INTRODUCTION

For the past decade, forensic-based television programming has captured the imagination of television viewers around the globe. In fact, The Huffington Post (2012) has called the C.S.I. franchise (e.g., C.S.I.: Crime Scene Investigation, C.S.I.: Miami) the most popular television franchise on the planet. In addition, other criminal procedural programs (often referred to as procedurals) such as True Detective, N.C.I.S., Monk, Criminal Minds, and “reality” series like 48 Hours, Forensic Files and The Investigators are also highly viewed by the public. The promulgation of these shows has inspired international procedurals such as *El Equipo* [The Team] (Mexico), “*Ermittlungen am Tatort*” [Investigation at the Crime Scene] (Germany), “Waking the Dead” (United Kingdom) and “*El Chapo*” (Colombia).

Due to their popularity, concerns have been raised that viewing television programs such as these may be giving the public false information and expectations about the availability, type, importance, and role of physical evidence in the adjudication process. The resulting fear has been that jurors who regularly watch these programs have begun to substitute that information for what is presented court evidence—i.e., the “C.S.I. Effect”. As a result, there has been a corresponding research interest in this area in the United States (Hayes & Levett, 2012; LaRose, et al., 2016; Shelton, 2010), Canada (Chin & Workewych, 2016; Holmgren & Fordham, 2011; Stinson, et al., 2007), and even Hong Kong (Hui & Lo, 2017). However, in spite of this growing academic attention, none has been undertaken in Latin America. As such, this research seeks to measure whether there is a causal relationship between the viewing of forensic-based television shows and the perception of criminal forensics among potential jurors in Colombia. More directly, our research question is: Does a “*C.S.I. Effect*” exist in Colombia?

REVIEW OF THE LITERATURE

As the literature in this area has grown, research findings have been largely split between measuring attitudes of practitioners and those of perspective jurors. In general, research finds a strong belief in the C.S.I.: Effect among criminal court participants (Maricopa County, 2005; Stinson, et al., 2007) viewing of forensic television programs shapes juror predispositions regarding scientific evidence and creates unrealistic expectations in both the availability and presentation of crime scene evidence. Perspective juror

research results, however, conflicts with this view. For example, in a survey of over 1,000 perspective jurors, Sheldon (2008) found that while jurors who watched these programs had a slightly higher expectation that forensic evidence be presented versus non-viewer, they did not *require* it to convict in most cases. Subsequent research has yielded supporting results whether with perspective jurors (those called to jury duty) (Shelton, et al., 2006) or potential jurors (those jury eligible) (Bonnell, et al., 2020; Hawkins & Scherr, 2017; Hayes and Levett, 2012; Hui & Lo, 2017; Smith, et al., 2007). Based on their research, LaRose et al. (2016, p. 60) have gone so far as to refer to concerns regarding the “C.S.I.: Effect” as nothing more than “prosecutorial egocentrism” and an excuse by prosecutors as an explanation for any failure to get a conviction, since, they also point out that conviction rates have actually *increased* over the past two decades. Continued growth in scholarship in this area will ultimately show whether the .C.S.I. Effect, in fact, exists. However, in order to do so, scholars need to explore beyond the traditional nations of research (e.g., U.S., Canada, and Australia). As such, this research was conducted in Colombia.

RESEARCH METHODS

The purpose of this study is to test the effect of television viewing on subject perceptions of forensic evidence by further empirically exploring the efficacy of the C.S.I. Effect hypothesis. The primary question of this research is: What is the relationship between fictional media depictions of criminal investigations and expectations of criminal evidence in Columbia? This research evaluates this question through multivariate statistical analyses.

Data

Data was collected at various large marketplaces in the cities of Medellin, Cali and Bogota since they provided the best opportunity to encounter a wide socio-demographic sample. Participation was limited to those 18 years of age or older (jury age) and respondents completion times ranged from 11 to 31 minutes. The survey instrument was a translated version of LaRose et al.’s (2016) survey that measured demographic data, technology usage, television viewing, understanding of the criminal justice process, evidence expectations based on crime scene scenarios and general knowledge of forensics. The survey was translated

and edited by Lola Hidalgo-Calle, professor of languages at the University of Tampa. The final N was 130. Subject demographics are provided in Table 1.

*** Table 1 goes here ***

The average age of participants was almost 34 years and the overwhelming majority, not surprisingly, identified themselves as Hispanic (97%), and over 60% of the sample was female. The majority of participants were employed, but a sizable minority (44%) identified themselves as students. In terms of location, three-fourths of the respondents lived in either Cali or Bogota.

Dependent Variables

The important dependent variables were those related to commonly utilized forensic evidence such as DNA, handwriting analysis, firearm evidence, fingerprints, and hair/fiber evidence. However, non-forensic, eyewitness testimony was included as a control since the majority of crimes are cleared (i.e., suspect identified) before forensic evidence has been processed (King, et al., 2013; Peterson, et al., 2010); we expected it to be negatively correlated to the “C.S.I.: Effect”.

*** Table 2 goes here ***

Table 2 shows that a significant majority felt that all forms of forensic evidence were necessary for criminal cases with eyewitness testimony, DNA, fingerprints and firearms having the greatest importance. However, handwriting (70%) and hair/fiber (75%) were also considered very important by subjects.

Independent Variables

This research focused on a limited number of independent variables seen as particularly substantive in influencing attitudes regarding forensics. Of particular importance, this research explored whether regular television viewing (i.e., regularly watch C.S.I. shows-yes/no and number of programs watched per week) of forensic-based programs was positively correlated with a “C.S.I.: Effect”. In addition, the research measured whether respondents had previous practical information (criminal justice course) or training regarding forensics (e.g., previous law enforcement experience), or were aware of the concept of a “C.S.I.: Effect”. The descriptive statistics for the independent variables outlined above are included in Table 3.

*** Table 3 goes here ***

Table 3 indicates that the majority of respondents do not watch C.S.I. type shows on a regular basis. In fact, fewer than a fifth of all respondents reported watching C.S.I. type shows regularly (the mean number of episodes was three per week). By contrast, news programs were viewed more often and more regularly (often 7 days per week) than even highly popular telenovelas (i.e., soap operas), comedy shows or sporting events. As a result, neither of these variables could be used in multivariate analyses due to issues associated with multicollinearity since so few respondents regularly viewed C.S.I. shows. In addition, only a small portion of the sample had previous knowledge of the “C.S.I. Effect” (9.8%) or had an affiliation with the criminal justice system (10.4%). This suggests what forensics beliefs most respondents had were not from television.

Analytic Strategy

While univariate statistics were utilized to support and provide context, the primary analytic strategy employed here is logistic regression. Logit regression is used when the dependent variable is dichotomous in nature, i.e., there are only two characteristics of the variable. All dependent variables in this analysis were initially measured as trichotomous variables. These were recoded as dummy-coded variables where individuals thought the evidence was either important (1) or not (0) which included “maybe” answers). A strong belief about the necessity of C.S.I.-type evidence was the key outcome and focus of this research.

Limitations

There were three limitations associated with the current research. First, the study rested on a convenience sample. Subjects were asked to participate in the study in large market places in three large Colombian cities. Subject selection was based on who was available and present on the days surveys were administered. Second, this study was likely subject to some level of self-selection where those more interested in the topic were more likely to partake. Third, most of the key predictor variables used here were in relation to media entertainment, not the news media. However, that is likely not a problem in this research as most subjects had little C.S.I. exposure in all forms of media denoted here.

ANALYSIS AND FINDINGS

This section examines the multivariate analyses associated with this study. The key dependent variables are the evidence that subjects deem necessary in determining court outcomes in criminal trials associated with violent crimes. The motivation to focus on violent crime is twofold. First, nearly all C.S.I. type shows focus on serious crime, specifically violent acts such as rape and homicide. Second, initial analyses suggested that the subjects themselves tended to think forensic evidence was more necessary for violent crimes. Table 4 presents these findings.

*** Table 4 goes here ***

Table 4 visually illustrates that respondents had higher expectations of forensic evidence in two violent crimes, homicide (75%) and rape/sexual assault (64.5%). No other crimes received an expectation above 27%.

The logistic regression analyses of the models for three of the dependent variables are provided in Table 5. Regression analyses for the expectation of DNA, firearm, and fingerprint evidence in criminal trials could not be completed due to a lack of variability across characteristics.

*** Table 5 goes here ***

The only analytic model to show statistically significant results was the hair/fiber model. The model would seem to explain 29% of the variance. Unfortunately, this finding should be viewed carefully for several reasons. First, while the model is statistically significant, only a single independent variable reached statistical significance (location). We expected this as location was the only bivariate correlation to gain statistical significance in initial bivariate analyses (not reported here). Overall, this suggests problems with the underlying data/model. Second, the extremity of some of the standard error coefficients associated with the independent variables suggest caution at interpreting the overall model coefficient (Nagelkerke R²). All of these analytical models that must have some association with the dependent variable have no impact on predicting if the C.S.I. Effect hypothesis actually impact court outcomes.

Due to the lack of findings from our multivariate analyses, we further analyzed respondents' general beliefs about the use of forensic science evidence in criminal proceedings taken from the survey instrument to

evaluate any possible C.S.I. effect. Table 6 provides respondents' general beliefs about the utility of forensic evidence.

Table 6 goes about here

A quick examination of this table indicates strong support for the inclusion of scientific evidence in not necessarily the C.S.I. Effect hypothesis. A striking number 91% of respondents suggested that the best way to solve crimes is through forensic evidence; this is closely related to the 83% of individuals who felt that criminals always leave some evidence behind. A large percentage of respondents also believed that the scientific evidence used by the police was reliable (82%), accurate (84.5%) and that different forensic investigators analyzing the same evidence would arrive at the same conclusion (84.7%). These results suggest considerable faith in forensic evidence.

Subjects did illustrate some lack of faith in forensic evidence. Sixty four percent of respondents acknowledged that forensic evidence is not error free. The subjects also thought that good detective work was just as valuable as the forensic evidence that was collected during the course of an investigation (75.4%). In total, the univariate analyses presented here suggest, at best, limited support for the C.S.I. effect hypothesis. When multivariate models are examined, the C.S.I. effect almost completely disappears with the exception of a single model and a single variable (location). The next section examines the conclusions based on this set of analysis.

CONCLUSION AND DISCUSSION

This research sought to expand the investigation of a potential C.S.I. Effect to Latin America, specifically, Colombia. While these findings do show high faith in and expectations of forensic evidence—as has previous research in other countries—they do not support the notion of an exportation of the C.S.I. Effect. In fact, the only statistically significant variable was location. As such, while forensic-based programing may be popular in Colombia, this research shows that it has not resulted in a fundamental change of citizen attitudes regarding such evidence.

While the findings do show a high expectation for scientific evidence in certain cases (e.g., 93% found forensics to be important forms of case evidence), the data also shows that eyewitness testimony was

universally expected provided such evidence was presented in the scenario. In addition, our findings show that prospective jurors had a higher expectation for forensic evidence in cases of homicide and sexual assault. In relation to the key *analytic* strategies examined here, logistic regression analyses did not indicate support for the C.S.I. Effect hypothesis. Two of the three models (hair/fiber and eyewitness testimony) were found to be statistically insignificant. The third model that did gain statistical significance is dubious because none of the variables or the constant approached statistical significance; the standard errors in this analysis indicated problems as well. Neither regularly watching C.S.I. type programming, being affiliated with law enforcement, nor previous knowledge of the C.S.I. Effect hypothesis had any effect on how the respondents viewed various types of evidence.

These results suggest there may be an identifiable “Colombian Effect” among the respondents. That is, since such a large proportion of citizens watched news regularly—in fact, news programs were the single most viewed programs—they are constantly exposed to criminal events and crime scenes, especially those in Medellin who have been exposed to high levels of violent crime, including thousands of cartel murders, for decades. It may be this constant, uncensored exposure to violent crime, graphic crime scenes and unfiltered news coverage may have resulted in Colombian’s citizens having developed an uncommonly high knowledge of the types, availability and process of collection of forensic evidence. The impact of this exposure is likely much greater than any fictitious portrayal.

This study affirms what has become largely accepted—that while criminal justice practitioners believe in a “C.S.I.: Effect”, empirical evidence has been found to suggest a lack of forensic evidence has been elusive, particularly in studies focusing on jurors or perspective jurors, regardless of nation. The rare exception has been some findings of a higher expectation for scientific evidence in more serious and/or violent cases (e.g., rape). However, there too, research has not shown that a failure to provide such evidence has led to a greater willingness to acquit. Due to this consistency of findings, we feel it is time for researchers to move beyond survey research and explore alternative methods of inquiry. For example, we suggest greater emphasis be placed on face-to-face, in depth interviews of *actual* jurors (i.e., those who have either sat through and/or deliberated a case). We believe this will provide considerable insight into sources of any juror

preconceptions of forensic evidence, its subsequent influence on the deliberation process, and ultimately the verdict. In addition, we believe researchers should expand beyond the traditional view that familiarity with C.S.I. is a product almost exclusively of television viewing and expand inquiry to uncover additional sources of forensic comprehension such as formal education and general knowledge, for example. Lastly, we compel researchers in this area, almost exclusively from Western, Anglo-Nations, to continue expanding inquiry beyond not just geographic borders, but cultural and linguistic ones, as well.

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Table 1. Subject Demographics

Variables	Categories	Percent	Mean
Age			33.85
Race	White	1.6%	
	Non-White	0.8%	
	Hispanic	96.9%	
Sex	Male	37.2%	
	Female	62.8%	

Job	Student	44.2%
	Employed	54.5%
Location	Bogota	13.8%
	Cali	63.1%
	Other	23.1%

N=130

Table 2. Importance of Various Forms of Evidence/Testimony

Variables	Categories	Percent
Eyewitness Testimony	Not Important	0.8%
	Maybe	11.6%
	Important	87.3%
Handwriting	Not Important	11.2%
	Maybe	18.4%
	Important	70.4%
Firearm Evidence	Not Important	0.8%

	Maybe	5.6%
	Important	93.6%
DNA	Not Important	0.8%
	Maybe	4.8%
	Important	94.3%
Fingerprints	Not Important	4.0%
	Maybe	1.6%
	Important	94.4%
Hair/Fiber	Not Important	13.6%
	Maybe	11.2%
	Important	75.2%

N=130

Table 3. C.S.I. Effect Independent Variables

Variables	Categories	Percent	Mean
Regularly watch C.S.I. type shows	No (0)	84.5%	
	Yes (1)	15.5%	
Exposure to C.S.I. type shows (Number of episodes/wk)			3.18
Courses with C.S.I. Effect	Yes (0)	9.8%	
	No (1)	90.2%	

Affiliated with law or police	Yes (0)	10.4%
	No (1)	89.6%

Table 4. Necessity of Forensic Evidence for Specific Offenses

Variables	Categories	Percent
Homicide	No Expectation	0.0%
	Some Expectation	25.0%
	High Expectation	75.0%
Rape/Sexual Assault	No Expectation	2.4%
	Some Expectation	33.1%
	High Expectation	64.5%

Burglary	No Expectation	21.0%
	Some Expectation	52.4%
	High Expectation	26.6%
Arson	No Expectation	29.0%
	Some Expectation	57.3%
	High Expectation	13.7%
Armed Robbery	No Expectation	45.2%
	Some Expectation	35.5%
	High Expectation	19.4%
Auto Theft	No Expectation	46.3%
	Some Expectation	42.3%
	High Expectation	11.4%

N=130

Attitudes About Interracial and Interethnic Dating and Marriage: The Role of Religious Belief and Social Distance Perspective

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Abstract

This study examined how attitudes about interracial and interethnic dating and marriage can be affected by religious belief and social distance perspective. This study found that Christian fundamentalism belief and social distance perspective affected the respondent's attitudes about dating and marriage between African Americans/Blacks and Hispanics with Whites. Higher levels of Christian fundamentalism belief and social distance perspective decreased approval for dating and marriage by African Americans/Blacks and Hispanics with Whites.

Key Words: religion, social distance, race/ethnicity, relationship

Introduction

Attitudes toward interracial dating and marriage have shown steady increases in approval among individuals in the U.S. over the past few decades (Golebiowska 2007). Ten percent of heterosexual married couples and 18% of unmarried heterosexual couples in the U.S. are interracial (U.S. Bureau of Census 2012). Anti-miscegenation laws criminalized interracial marriage, cohabitation, and sex in individual states throughout the United States. Additionally, historically interethnic dating and marriage

has also been viewed as taboo in the United States. Even though no longer criminal, negative attitudes about interracial and interethnic dating and marriage persist.

Durkheim's classic study of suicide found differences in religion could possibly explain behavior among Protestants and Catholics (Durkheim, 1951). Unnever and Cullen (2006) studied Christian fundamentalism and suggest the impact of religion on various social issues requires examining different aspects of religiosity. Pearce, Hayward, and Perlman (2017) point out five dimensions of religiosity: religious beliefs, religious exclusivity, external practice, personal practice, and religious salience. To determine whether religion work as a bridge or as a barrier with intimate relationships, this study focused on belief. Specifically, the effect Christian fundamentalism belief has on attitudes toward interracial and interethnic dating and marriage.

Park (1924) states that the level of intimacy, closeness, and remoteness individuals of different social groups have with each other can be evaluated (Social Distance). This in turn could influence attitudes toward interracial and interethnic dating and marriage.

This study contributes to the current controversy in the literature that has found religion can have a positive or negative effect on interracial and interethnic dating and marriage between African Americans/Blacks and Hispanics with Whites. Also studied is the effect that social distance perspective from people of a different race and ethnicity has on attitudes toward interracial and interethnic dating and marriage (African Americans/Blacks and Hispanics with Whites).

Interracial and Interethnic Dating and Marriage

Studies measuring attitudes toward interracial and interethnic dating have frequently focused on the role of race, age, education, and gender. There are many factors to interethnic and interracial dating and marriage, however, the data shows that Whites are less likely than non-Whites to date outside of their race (Knox et al 2000; Levin et al 2007; Yancey 2002). Glazer (1998) found African Americans/Blacks had the lowest level of intermarriage with Whites when compared to Hispanics and Asians. Younger people are more likely to have approving attitudes toward interracial dating (Johnson & Jacobson 2005), more educated people have higher rates of approval of interracial dating (Yancey 2002), and more politically

conservative individuals are less approving of interracial relationships (Johnson & Jacobson 2005; Fang et al 1998).

Lampe (1982) found reasons against interethnic and interracial dating focused on patterns of behavior. If the pattern of behavior is for no interaction between different groups, then that will carry over to intimate relationships.

Social Distance

Park (1924) states that the level of intimacy, closeness, and remoteness individuals of different social groups have with each other can be evaluated (Social Distance). In dating or marriage relationships, the level of social distance (diversity) influences whether a person will choose someone of a similar or dissimilar background as a partner. Marisol Clark-Ibanez and Diane Felmlee (2004) and Porter and Emerson (2012) found a diverse social network increases the odds of interethnic personal relationships and how a person perceives people of other racial and ethnic groups.

Perry (2013b) examined social distance by studying how the racial composition of neighborhoods, workplaces, congregations, and friendships affects Caucasian's attitudes toward interracial and interethnic marriage with blacks, Latinos, and Asians. While friendships do make a difference, the social context as well as the type of minority group had an effect. Whites had a higher rate of acceptance of interracial and interethnic relationships when there was a large proportion of Asians in a neighborhood, but this was not the case for blacks and Latinos. Johnson and Jacobson (2005) also found contact between different groups in various social settings also influenced attitudes pertaining to interracial and interethnic relationships. Fischer (2011) found programs such as extracurricular activities in college provide the perfect situations for people to interact with others from different racial or ethnic backgrounds. According to Parks et al. (1983) the level of support or opposition from one's social network will also affect social distance and the likelihood of participating in an interracial or interethnic relationship. According to Perry (2013b), the workplace can create larger social distances. Perry (2013b) found a larger proportion of blacks in the workplace creates discomfort to Black-White intermarriage among Whites.

Belief in Social Dominance Theory

According to Sidanius (1993) social dominance theory proposes that societies are organized with the belief of group-based hierarchies. Social dominance theory focuses on individual and structural factors that contribute to group-based superiority and oppression. Sidanius et al. (2004) state group-based inequalities are created and sustained through three primary intergroup behaviors: institutional discrimination, aggregated individual discrimination, and behavioral asymmetry. This in turn can lead to not approving of interracial and interethnic relationships. Sidanius et al (1994) state individuals who believe in social dominance theory will favor hierarchy-enhancing legitimizing beliefs, which promote or maintain group inequality and separation. Hing et al. (2007) found individuals who follow the ideas of social dominance theory may also exhibit dominance on the interpersonal level.

According to Sohoni (2007) racial mixing was a concern because it would undermine a race-based stratification system. Maintaining social distance between the races via anti-miscegenation laws, allowed the people in charge to preserve their social and economic dominance in society.

Kteily et al. (2011) found social dominance theory can be used to measure attitudes toward interracial relationship among different groups. High social dominance theory acceptance is a causal factor in predicting racial and ethnic prejudice. Fang, Sidanius and Pratto (1998) measured the relationship between social dominance theory acceptance and attitudes toward interracial marriage across four ethnic groups in the US. They found that higher acceptance of social dominance theory was significantly correlated with higher opposition towards interracial relationships. Lalonde et al (2007) conducted a similar study in Canada, which confirmed these findings.

Positive Impact of Religion on Interracial and Interethnic Relationships

Religion can encourage interracial and interethnic friendships, which in turn could turn to long-term relationships. Wong (2009) found pastoral leadership was necessary to promote interracial friendship. Communication between black and White congregants and racially representative leadership assisted integrating different groups into the congregation. According to Wong (2009) the Protestant church strategy was to encourage a group identity between both White and Black members. This study found that religion can facilitate positive relationships between individuals of different racial backgrounds. If a

religious identity can supersede a racial or ethnic identity, then interracial and interethnic relationships could occur.

Perry (2013a) found higher participation in devotional practices and integrated church attendance may incline Whites to support interracial exogamy. Religion can provide individuals with a common ground on which to build relationships with other races and serve as a conduit for breaking down racial barriers and promote interracial relationships. Park and Bowman (2015) found general religiosity had a positive connection with cross-racial interaction for Asian American, White, and black students. The strength of the students' religious beliefs can provide them with common goals that can help facilitate cross-racial interactions.

Johnson and Jacobson (2005) found friendships within a religious setting could also have a positive effect. Individuals who belonged to a church that were diverse supported interracial marriage. Wong's (2009) found how congregations frame diversity in their religious mission and had implications for intrachurch cross-race ties.

Negative Impact of Religion on Interracial and Interethnic Relationship

Religion can also work as a barrier to interracial and interethnic relationships. Park and Bowman (2015) found students who identified themselves as Protestant had a lower level of cross-racial interaction than Muslim, Buddhist, Jewish, and Hindu students. Similarly, Perry (2014) also found individuals with Protestant parents were less likely to date interracially. Frequent religious attendance at age 12 and region of the nation also affected interracial relationships and reduced the probability of interracial dating. Perry (2013a) found conservative religious affiliation (relative to non-affiliation) could influence White's disapproval of interracial marriage. Perry (2013a) also found individuals who had frequent church attendance and literal belief in the bible were less likely to date interracially. Park (2012) also found participation in religious organizations had a negative effect on interracial friendships which can then lead to dating and marriage. Based on the review of literature and the theoretical perspective two hypotheses were created.

H1: There is an inverse relationship between Christian fundamentalism and approval of

interracial and interethnic dating and marriage.

H2: There is an inverse relationship between social distance and approval of interracial and interethnic dating and marriage.

Methods

Data was collected from 589 respondents from a southwestern university during the 2014 academic year. A self-administered online survey was created. Institutional review board approval was obtained, and respondents were given confidentiality and anonymity.

Table 1 shows over half of all respondents are female 59% and 41% are male. The mean age of the respondents was 21 years old. The racial and ethnic makeup of the respondents is comprised of 63% White, 25% Hispanic, and 11% African American/Black. Most respondents were freshman (36%), a little less than a quarter were sophomores (23%), followed by juniors (21%), and seniors (20%). 88% of all respondents reported that they were currently in a relationship. By combining the respondent's family income and parents' education answers a socioeconomic status scale was created (Range 3-33). The mean SES scale score is 17.79. Family income was measured in \$10,000 dollar categories. The average family income of the participants surveyed was \$90,000 to \$99,999 dollars. Respondent's mothers had a higher educational level than respondent's fathers.

This study includes a 33-item social desirability scale (Range 33-132) (Reynolds 1982). A low score indicates untruthful responses, and a high score indicates more truthful responses. The mean scale score is 87.95 (Cronbach's alpha.748) (Response set 1=Strongly Disagree;2=Disagree;3=Agree;4=Strongly Agree).

Dependent Variables (Attitudes Toward Interracial and Interethnic Dating & Marriage)

Two dependent variables were constructed. Each dependent variable is a two-item scale that measure attitude toward interracial and interethnic dating and marriage (Field 2013). 1) approval of African American/Blacks to date and marry Whites: 2) approval of Hispanics to date and marry Whites. A low score indicates disapproval of interracial and interethnic dating and marriage (Range 2-8). Approval of African American/Blacks to date and marry Whites has a mean scale score of 6.137 (Cronbach's

alpha.968). Approval of Hispanics to date and marry Whites has a mean scale score of 6.366 and has a Cronbach's alpha of 0.961 (Response set1=StronglyDisagree;2=Disagree;3=Agree;4=Strongly Agree).

Independent Variables (Christian Fundamentalism& Social Distance)

Two independent variables that were constructed. The first independent variable is a 6-item scale that measures Christian fundamentalism beliefs (Koch and Ramirez 2010). Respondents were asked if they disagreed or agreed with statements regarding the Bible and Christianity (Range 6-30). A low score indicates that respondents disagree with statements regarding the Bible and Christianity. A high score indicates that respondents agree with statements regarding the Bible and Christianity. The mean scale score is 17.957 (Cronbach's Alpha.892)(Response set1=Strongly Disagree;2=Disagree;3=Not sure;4=Agree;5=Strongly Agree).

The social distance variable is measured by asking respondents how they would feel about people of a different race or ethnicity, joining their church, having them over for dinner, or as business partner. The scale consists of 12 items (Parillo and Donoghue 2005). The scale is reverse coded to be consistent with high scores indicating more social distance and lower scores indicating less social distance (Range 12-48). The mean scale score is 17.215 (Cronbach's Alpha .982) (Response set 1=Strongly Disagree;2=Disagree;3=Not sure;4=Agree;5=Strongly Agree).

DATA ANALYSIS(Christian Fundamentalism OLS Regression Analysis)

Ordinary least squares regression was used to test the two hypotheses. Model 1 is testing the first hypothesis, the effect of race. This hypothesis was supported. Model 1 shows that Christian fundamentalism has an inverse relationship to approval of interracial dating and marriage between African America/Blacks and Whites ($p < .01$). The greater Christian fundamental beliefs, the less likely a person approves of interracial dating and marriage between African American/Blacks with Whites. Additionally, Whites have a less favorable attitude than nonWhites ($p < .001$) to interracial dating and marriage between African Americans/Blacks with Whites.

Model 2 is also testing the first hypothesis, the effect of ethnicity. This hypothesis was supported. Model 2 shows that Christian fundamentalism has an inverse relationship to approval of interethnic dating

and marriage between Hispanics with Whites ($p < .001$). The greater Christian fundamental beliefs, the less likely a person approves of interethnic dating and marriage between Hispanics with Whites. Additionally, Whites have a less favorable attitude than nonWhites ($p < .001$) to interethnic dating and marriage between Hispanics with Whites.

Social Distance OLS Regression Analysis

Model 1 is testing the second hypothesis, the effect of race. Model 1 shows that there is a slight negative relationship between social distance perspective and favorable attitudes toward interracial dating and marriage between African American/Blacks with Whites ($p < .001$). As social distance perspective increases, attitudes toward interracial dating and marriage between African American/Blacks with Whites become less favorable. Whites have a less favorable attitude than nonWhites ($p < .001$) about interracial dating and marriage between African American/Blacks with Whites.

Model 2 is also testing the second hypothesis, the effect of ethnicity. This hypothesis was significant. Model 2 shows that there is a slight negative relationship between social distance perspective and favorable attitudes toward interethnic dating and marriage between Hispanics and Whites ($p < .001$). As social distance perspective increases, attitudes toward interethnic dating and marriage between Hispanics and Whites become less favorable. Whites have a less favorable attitude than nonWhites ($p < .001$).

Discussion & Conclusion

This study found Christian fundamentalism and social distance perspective played a role in attitudes about dating or marrying interracially and inter-ethnically (African Americans/Blacks and Hispanics with Whites). Two hypotheses were found to be significant. Respondents who valued Christian fundamentalism were found to be less likely to approve of interracial or interethnic relationships. Respondents with a high social distance perspective were also less likely to approve of interracial and interethnic dating or marriage.

One of the major findings from this study coincides with the Perry's (2013a) research. Individuals who had a literal belief in the bible were less likely to date interracially. Hence as Christian fundamentalism increased approval of interracial and interethnic dating and marriage between African

Americans/blacks and Hispanics with Whites decreased. While Wong's (2009) study emphasized the positive impact that religion has on encouraging interracial and interethnic dating and marriage, this study does not provide the same support. Christianity fundamentalism was a barrier. Religious congregations can play a vital role in increasing positive or negative racial and ethnic relationships.

Social distance perspective was also found to be significant in this study. As this study and previous studies have found, interactions with people of diverse racial and ethnic backgrounds may change individuals' attitudes towards those groups. According to Porter and Emerson (2012), associating with people from diverse backgrounds is essential to increasing understanding and tolerance for those who are different from us. Less exposure to people with different ideas might make individuals less likely to incorporate new ideas into their own belief system and personal relationships.

Socially dominant attitudes could make an individual less likely to associate with a diverse group of people with different ideas from their own. This lack of diversity in their associations might lessen the likelihood of promoting the tolerance of other opinions such as approval of interracial and interethnic dating or marriage.

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Table 1 Gender Differences in Respondents' Characteristics

Characteristics	Total	Male	Female	Significance
(N=589)	(n=241)	(n=348)	Chi ² or T-test	
	100%	41%	59%	
Age (Mean)	21	21	21	P>F = 0.078
Race/Ethnicity				
White (Caucasian)	63%	65%	62%	P = 0.435
Hispanic	25%	23%	27%	
African American/Black	11%	13%	11%	
Year in university				
Freshman	36%	38%	36%	P = 0.724

Sophomore	23%	24%	22%
Junior	21%	21%	21%
Senior	20%	17%	21%

Relationship Status

Previous relation or never had one	12%	12%	12%	P = 0.963
Currently in a relationship	88%	88%	88%	

Socioeconomic Status (Mean)	17.79	18.63	17.35	P>F = 0.040*
Scale Range (3 to 33)				

Family Income (Dollars)	\$90-99,999	\$100-109,999	\$90-99,999	P>F = 0.020*
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Mother's Education Level

0 to 8 years	23%	24%	22%	P = 0.504
9 to 11 years	11%	8%	13%	
12 to 14 years	25%	26%	25%	
15 years or more	42%	41%	40%	

Father's Education Level

0 to 8 years	26%	26%	25%
9 to 11 years	14%	11%	16%
12 to 14 years	25%	24%	25%
15 years or more	36%	38%	34%

Social Desirability (Mean)	87.95	88.44	87.90	P>F = 0.431
Scale Range (33 – 132)				

*p > .05; **p>.01; ***p>.001

“New York and the Irish Famine”

Dr. Harvey Strum

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When members of the Jewish congregation Shearith Israel met in New York City in early 1847 to donate to the Irish victims of the Great Famine they joined in a statewide and national nonpartisan and ecumenical effort: “Our citizens have come forward with promptitude and generosity; contributions have poured in from all classes, from all sects.”¹ According to the New York State Irish and Scottish Relief Committee, based in Albany, the contributions collected from the residents of Albany, represented “the equally mingled contributions of the Protestant and Roman Catholic, native- and foreign-born citizens of the City of Albany.”² The New York State Irish committee sent the donations to the Roman Catholic and Anglican archbishops of Ireland via the Society of Friends in Dublin, the primary distribution center for American contributions during the Great Famine. New Yorkers of all religious denominations donated to Irish relief in what became a national cause of American philanthropy in 1846-47. A New York City resident, Philip Hone, noted in his diary, “The Catholic Churches have given nobly, and every denomination of Christians has assisted liberally in the good work: Episcopalians, Presbyterians, Methodists, Baptists, and Romanists are all united as one congregation in this brotherhood of charity.”³ Shearith Israel became the focal point for Jewish congregations to join in a special meeting for Irish relief. Even the children of the New York gave their pennies and dimes for the Irish. Beckie Harvey, daughter of New York City Quaker leader Jacob Harvey sold her toys to raise money for the starving Irish. “My little Becky...insisted on sending a gold piece \$2.50 as her contribution and not satisfied...she put up some of her playthings for sale at 12 ½ cents a ticket, and her toys brought in \$30,” her father Jacob Harvey proudly reported.⁴

“Never let it be said...by the historian...that America was indifferent to the present sufferings in Ireland,” New York City Congressman William Maclay proclaimed to an audience of American political leaders and residents in Washington, D.C. in February 1847.⁵ A potato blight hit Ireland and Scotland in 1845 with over 1.5 million dying in Ireland out of pre-famine population of 8.4 million in 1840. Thousands died in the Highlands and Islands of Scotland and tens of thousands in Belgium, Spain, northern France and the German states, but it paled compared to the magnitude of the disaster in Ireland. Over two million Irish fled to Great Britain, Canada, Australia and United States. About 1.5 million Irish arrived in the United States between 1845-55. Ireland produced 46% of the immigrants entering the United States from 1845-55, and the famine experience dominated the story of the Irish in America. The Irish famine had two other immediate consequences for the United States---the mass flight of the Irish to America altered the ethnic and religious make-up of American cities, like Albany, Troy, and Brooklyn, and the United States emerged as the leader in international philanthropy. Irish immigration changed the religious and ethnic diversity of New York state, and New York City emerged as the center for famine relief in the United States.

News of the famine reached the United States in late 1845. Irish-Americans and non-Irish organized public meetings and started raising funds in some cities, like New York and Savannah. Political leaders, clergymen, merchants, and Quakers joined in this voluntary effort. Expectations of better harvests ended this limited effort until news arrived in the United States in November 1846 of another crop failure and millions of Irish at risk of starvation. Three million Irish and about 150,000 Scots became at risk of

starvation due to their dependence on the potato as their major food source. Newspapers throughout New York state and the nation reported on the misery in Ireland. Readers of Rochester newspapers, for example, learned that “the accounts of the state of the country appear to be most distressing.”⁶ Reports appeared in the press of “women frantic with hunger and the cries of famishing children.”⁷ Simultaneously, the Quakers established the Central Committee in Dublin to coordinate relief operations. Irish Quakers sent appeals to the United States to encourage public meetings and donations. Jonathan Pim, one of the secretaries of the Irish Quakers, wrote to Jacob Harvey, a leading New York City Quaker, on the starvation, disease, and misery he witnessed on a visit to western Ireland, confirming the reports in the Rochester press and newspapers throughout the country about the grave situation in Ireland.⁸ Pim wanted New York City’s Quakers to help raise funds and spread news about the famine to the American public. Jonathan Pim sent several requests to Harvey in December 1846 and January 1847, and Harvey immediately responded. Harvey notified Quakers in Philadelphia and Baltimore. He arranged for the publication of the Quaker appeal in the New York press “in the hope that it would bring in subscriptions both from the rich and poor.”⁹ Harvey expected rich New Yorkers to send contributions via John J. Palmer, President of the Merchants’ Bank. He met with Roman Catholic Bishop John Hughes to reach out to the Irish poor for donations, and to arrange for an appeal to be made at Sunday services in the city’s Catholic churches.

To promote donations from non-Irish New Yorkers Harvey emphasized the remittances sent by the poor Irish in New York City and other parts of the United States. Harvey contacted banks and money transfer houses that sent money from Irish immigrants to family and friends in Ireland. He expressed pride that the “Irish in America have always remitted more money, ten times over, than all other foreigners put together!”¹⁰ The poor Irish men and women of New York City quietly sent remittances of \$5 to \$25 to their relatives in Ireland. As he told Irish Quaker Jonathan Pim, “recollect that the donors are working men and women, and depend on their daily labor for their daily food.”¹¹ From 1 November 1846 to 1 January 1847, Irish immigrants and Irish-Americans remitted \$150,000 to Ireland. During 1846 New York City’s Irish sent \$808,000 to alleviate the suffering of their relatives and friends. Irish in Baltimore remitted \$23,500, and Irish in Philadelphia sent \$170,160 to the old country. Poor Irish immigrants sent money to even poorer relatives in Ireland, and “all done quietly, regularly, and systematically, without any parade of public meetings or committees.”¹² Harvey highlighted the contributions of the poor Irish working men and women to encourage middle and upper-class Americans to donate to Irish relief. Taking the lead from Jacob Harvey other New Yorkers commented on Irish remittances. A merchant in Rochester, for example, offered to serve as the agent to remit free of charge any remittances from local Irish that they cared to send “for he relief of the starving people of that country.”¹³ Hamden and Company, on Wall Street, in New York City offered to send free of charge “any sum—small or great—to Ireland free of discount for their trouble” remittances sent from the Irish living in Brooklyn.¹⁴ Upstate, Irish working-class women and men in Troy sent \$2,000 in February to family and friends in Ireland.¹⁵ By mid-March the Irish in Troy had forwarded \$16,000 over the previous fourteen months to relatives in Ireland. Across the Hudson in Watervliet, then called West Troy, poor female Irish servants collected \$600 in January and February 1847 to remit to Ireland.¹⁶ Newspaper editors in Buffalo and Herkimer commended the Irish for their generosity. Albany’s Irish community and the Catholic clergy worked together to maximize the amount of remittances poor Irish laborers and domestics could donate.¹⁷ Remittances from smaller Irish communities, like Plattsburgh and Keeseville, came in to the Albany community for forwarding to Bishop John Hughes, in New York, who offered to coordinate remittances from upstate New York. Local priests, like J. Rooney, in Plattsburgh collected the remittances from parishioners in Clinton County for forwarding. Admiring the commitment of the Irish in Albany, the largely Protestant members of the Albany Irish and Scottish Relief Committee congratulated their fellow residents, native born and adopted, for “donations privately transmitted which, regarding the limited pecuniary resources from which it is given, we believe to be unequalled in the charities of [the] world.”¹⁸ News of the worsening conditions in Ireland led to meetings in East Coast cities like Philadelphia, Boston, and New York. In the metropolitan New York city area Irish-American, labor, Quaker, and political leaders organized public meetings in Paterson, Jersey City, Brooklyn, and New York City

between November 1846 and early January 1847. In late November 1846, the directors of the Workingmen's Protection Association called a meeting of the citizens of Jersey City to devise "some plan to minister to the relief of the suffering poor of Ireland."¹⁹ Residents of Brooklyn met in late November for "Relief to Ireland." Women attended as well as men because "seats were reserved for ladies." Women of Brooklyn took an active role in fundraising for the starving in Ireland. Leaders of the meeting drafted an address warning of the "great and unprecedented distress of present exists in Ireland" and calling on the citizens of Brooklyn to donate to this worthy cause.²⁰ The mayor of Brooklyn agreed to serve as Treasurer of the Brooklyn Irish Relief Fund. The Brooklyn *Daily Eagle* encouraged contributions "for starvation cannot **wait**, any more than wind or tide!"²¹ At the same time, citizens of New York City met to raise funds for Irish relief. A large gathering of New Yorkers met at Tammany Hall in late December, and Mayor Alexander Mickle chaired the meeting. Editor Horace Greeley delivered the main speech outlining the starvation in Ireland and the need of the people of New York City to join in this philanthropic endeavor. People attending the meeting elected a committee to solicit donations and established ward committees to blanket the city. The general committee included Mayor Mickle, Horace Greeley and three aldermen. Ward committees included Mickle, every alderman, Jacob Harvey, and prominent department store owner Alexander Stewart. Mayor Mickle sent the \$4,600 donated to the Dublin Quakers.²² Separately, New York City Quakers, at the Rose Street meeting, decided "to throw in their mite to alleviate the sufferings of the poor Irish." Funds collected in early January amounted to \$1,105.²³ The people of New York City region started to organize for Irish famine relief, but the central role of New York in the national effort had just begun.

Famine relief meetings in New York City, Brooklyn, Jersey City, Boston, and Philadelphia did not lead to immediate action nationally. Americans contributed thousands of dollars for Irish relief, but "generally speaking, the response remained until February relatively small."²⁴ The arrival of the *Hibernia* in Boston in mid-January followed two weeks later by the *Sarah Sands* brought grim reports of mass starvation. Newspapers throughout the country reported on the disaster in Ireland. According to the Binghamton *Courier* "day after day the distress continues to increase, and famine is doing the work of death in various parts of the country."²⁵ Readers of the Oswego *Palladium* learned that "the famine continued to increase and deaths were daily occurring in consequence."²⁶ Publishing reports from the Irish press of "these abodes of wretchedness" created by the famine, the Rochester *Democrat* told its subscribers "to read the following heartrending account of suffering..." and then donate to Irish relief.²⁷ These reports of mass starvation stimulated a national movement to help the starving people of Europe.

Citizens of New York City, Philadelphia, Charleston, and other port cities sent petitions to the House of Representatives and the Senate calling for action in early February 1847.²⁸ An unknown resident of Troy, "A Trojan," sent a letter to a Washington newspaper recommending that Congress and President James Polk send warships to major ports, such as New York City and Boston, to transport relief supplies to Ireland.²⁹ The first meeting that received national attention took place in New Orleans on 4th February, because former Whig presidential candidate Henry Clay delivered an impassioned speech for Irish relief. A few days later, a Washington mass meeting chaired by Vice President George Dallas, and attended by many members of the House, Senate, and Supreme Court called for a national movement of voluntary philanthropy to aid the Irish and Scots. Democratic Senator Daniel S. Dickinson of New York served as one of the Vice-Presidents of the meeting, Whig Congressman Washington Hunt of Lockport helped draft the resolutions, and Congressman William Maclay of New York City delivered one of the major speeches. National political leaders designated New York City, New Orleans, Boston, Philadelphia, Washington, Baltimore, and Charleston as the major collection centers and distribution points for Irish and Scottish relief. For example, the meeting called on Moses Grinnell, mayor of New York City, and Cornelius Lawrence, the collector of customs, to lead the New York City campaign for Irish relief. Smaller communities should create their own Irish and Scottish relief committees, collect money, food, and clothing, and forward their donations to these major centers for transportation to Europe. By publicly endorsing the famine relief effort the nation's political leaders blessed a national campaign of voluntary philanthropy and acted as a catalyst to spur local political, business, religious, and civic leaders to organize famine relief committees in villages, towns, and cities throughout the nation.³⁰

While national political leaders, Whigs and Democrats, appealed to the American public to join in a national campaign to help the Irish and Scots they did not ask President Polk or Congress to vote appropriations for Irish relief. Whig Senator John Crittenden of Kentucky and Congressman Hunt proposed an appropriation of \$500,000 for the purchase and shipment of food to Ireland. The proposal, with bipartisan support, passed the Senate, but President Polk threatened to veto the measure if the House approved it, because Polk viewed foreign aid as unconstitutional.³¹ The bill failed because Democrats in the House listened to the objections of President Polk. A smaller scale measure suggested by Daniel Sickles in the New York State Assembly to use state funds to buy provisions for the Irish met the same fate due to constitutional scruples about using state funds for foreign aid. In response to petitions from citizens in New York City, Albany, Boston, and Philadelphia and public letters from Commodore George DeKay of New Jersey and Captain Robert Forbes and Whig Congressman Robert Winthrop of Massachusetts Congress considered a proposal to loan two American warships, *Jamestown* and *Macedonian*, that would sail from Boston and New York City, respectively, with privately donated relief supplies.³² Democratic Senator John Dix of New York and Whig Senator John Fairfield of Maine proposed on 24th February that Congress approve the proposal. A joint resolution passed the Senate on 2 March and House on 3 March. President Polk approved loaning warships to carry privately contributed food supplies. This is the only time in the history of the Navy that warships were loaned to private individuals to command, and President Polk had no constitutional objections to this unique use of American warships as messengers of charity.³³

Meanwhile, back in Albany the press and state and local political leaders advocated for Irish and Scottish relief. Editor and Whig political leader Thurlow Weed, in his Albany *Evening Journal*, reported on 9th February that a movement began in Albany “to immediately purchase a cargo of corn” for shipment to Ireland.³⁴ Democratic and Liberty Party newspapers encouraged the public to join in this philanthropic cause. William Cassidy, in the Albany *Evening Atlas*, asked: “Are we not here to have a share in this movement.”³⁵ Albany Mayor William Parmalee, a Whig, promoted a movement by local citizens to help the Irish and organized a public meeting on February 12th at the State Capitol. Prominent Whig and Democratic politicians appeared at the meeting, including Democrat John Van Buren, son of former president Martin Van Buren, and Governor John Young, a Whig, who took over leadership of the meeting from Mayor Parmalee. Politicians, merchants, and bankers who dominated the meeting called for the creation of the Albany Irish Relief Committee that became the New York State Irish Relief Committee. Governor Young spoke of the magnitude of the crisis, the need to help, common humanity, the bond with the Irish, and Americans as a people of plenty living in “the granary of the world.”³⁶ John Van Buren, the major speaker reminded his audience of the remittances of working-class Irish. Van Buren stressed that Americans as members of a republican society, a beacon of liberty, had a moral obligation to engage in international philanthropy to help the Irish. Van Buren understood the obligations of the American republic as the United States emerged in 1847 as the leader in international voluntary philanthropy. Following the Washington recommendations, the meeting at the Capitol encouraged every village, town, and city in the state to create Irish and Scottish relief committees.

State legislators contributed \$380 for the Irish, but refused proposals to appropriate public money for international aid. At the local level, Buffalo and Rochester considered aid to the Irish, but rejected foreign aid on the same constitutional grounds as the state legislature and President Polk.³⁷ New York City followed its own foreign policy, and the New York City Common Council voted \$5,000 for Irish relief enough to purchase over 1,000 barrels of flour.³⁸ New York City was the only public body in the United States to appropriate funds for Irish relief. While the state legislature refused to appropriate public money, it repeated the call for every village, town, and city in the state to establish committees for Irish relief. In their appeal to the citizens of New York state the legislators emphasized common humanity, the magnitude of the crisis, and Americans as a people of plenty.

A similar appeal came from the Albany Irish Relief Committee on 15th February. In its statewide appeal the committee asked every ward, village, town, and city to establish an Irish or Irish and Scottish relief committee. Charles Jenkins, “a successful local lawyer,” and Whig alderman of the Sixth Ward chaired the committee.³⁹ Bank president Thomas Olcott served as Treasurer, and John Ford, a lawyer, served as

Secretary. The committee successfully solicited donations from the Capital District and from upstate New York. About half of Albany's donations came from the city's Irish, who gave more proportionally than the larger Irish communities in New York and Brooklyn. The three Roman Catholic churches in Albany raised over \$5,000. Contributions came from the city's Irish elite and from poor working-class Irish, like David Mahony, a laborer on Albany's waterworks, or Michael Masterson, a street paver.⁴⁰ Members of the city's Protestant churches and the Protestant establishment eagerly contributed and served on relief committees. As Charles Jenkins told the Dublin Quakers "these two thousand barrels are the equally mingled contributions of the Roman Catholic and Protestant citizens of the city of Albany."⁴¹ Altogether, the Albany or State Irish Relief Committee collected over \$25,000 for Ireland and \$1,700 for Scotland. Donations came in from communities across upstate New York, for example, Buffalo and Geneva.⁴² The committee sent two "Albany" ships, *Minerva* and *Malabar*, via the New York City committee, to Cork and Dublin, respectively, for the Irish Quakers to forward to the Catholic and Anglican bishops of Tuam, Cashel, Cork, and Dublin. Dublin Quakers acknowledged the arrival of *Minerva* with 2,000 barrels of cornmeal as "the contributions of the generous inhabitants" of Albany.⁴³ Historian Christine Kinealy concluded: "Undoubtedly, the generosity of the people of Albany helped to save many lives throughout Ireland."⁴⁴

Albany sent the cargoes of food to Ireland and Scotland to New York, because New York City emerged as the major port in the United States for sending provisions and clothing to Europe. Committees established for Irish and Scottish relief became the most important and successful relief committees in the country.⁴⁵ Thirty-six ships, the largest number of any port in the United States, transported food and clothing to the Irish and Scots. Responding to the latest news from Ireland a group of affluent New Yorkers, including Jacob Harvey, Myndert Van Schaick, August Belmont, Philip Hone, John Hay, Theodore Sedgwick, and Moses Grinnell, endorsed meetings for Irish relief. Meetings held on 27th January and 7th February solicited donations from businesses, merchants, bankers, and wealthy New Yorkers. Van Schaick, a Democratic politician, successful businessman, and transplanted Albanian opened his own subscription list for Irish relief in early February and solicited contributions from New York's elite. Spurred on to further action by the public meetings in Washington and Albany citizens requested another meeting and organized a Standing Committee for Irish relief with Van Schaick as chair on 10th February. Two days later, on 12th February, New Yorkers gathered at the Prime Building on Wall Street for a fundraising meeting chaired by Van Schaick. Diarist Philip Hone observed that it was "attended by the right sort of folks," and part of "a great movement on behalf of the suffering people of Ireland."⁴⁶ Participants at the meeting pledged \$9,000, and the meeting issued a call to the clergy to solicit contributions.

"A most respectable and earnest audience" responded to a request from the Standing Committee to attend a general citizens meeting at the United Church of Christ Tabernacle on 15th February. By the end of meeting, \$20,000 was pledged, and the public meeting reaffirmed the establishment of the General Relief Committee of the City of New York.⁴⁷ People of different religions and ethnicities attended the meeting and Van Schaick asked for public support to help the starving Irish. In response two of Philip Hone's friends canceled "two sumptuous dinners" worth three hundred dollars to buy fifty barrels of wheat flour for the Irish.⁴⁸

On 27th February, the day set aside for churches to seek donations, thirteen Catholic churches in New York raised over \$10,000, and Catholic congregations in Harlem, Brooklyn, and Williamsburg donated \$200, \$2353, and \$278, respectively. Poorly paid women, working as domestics, who attended the Church of the Nativity on Second Avenue, donated \$400 even though their "wages are little more than sufficient to supply their wants."⁴⁹ Every Protestant denomination contributed--Episcopalian, Baptist, Methodist, Presbyterian, United Church of Christ, Congregationalist, Unitarian, Universalist, German Lutheran, and Dutch Reformed churches. As an example, Rev. Dr. Taylor of the Episcopal Grace Church, raised enough money in his congregation for 373 barrels of corn meal. Congregation Shearith Israel, the oldest Jewish congregation in the United States, held a special meeting for Irish relief. Religious leader Jacques Judah Lyons told his audience, "a nation is in distress, a nation is starving."⁵⁰ Members of B'nai

Jeshurun also donated. As the General Committee concluded: “from all denominations of Christians and from the Jewish Synagogues came cheerful and, in some cases, very liberal gifts.”⁵¹

Contributions came in from the wealthy, middle class, and working-class New Yorkers. Printers at the New York *Express*, clerks working at the department store of A.T. Stewart, workmen of Moses Baldwin, hands at the Brown and Co.’s bindery, and workmen at Peckham and Rusville donated to Irish relief. Children sent in their pennies for Irish relief, like the daughter of Jacob Harvey or the girls at Charlotte Haven’s school who held a fair for the Irish and raised \$287. Boys at the Ward School 3 in the 10th Ward sent in \$1.54 in pennies. Members of different ethnic groups contributed, like the French citizens of New York or the “Choctaw tribe of Indians in the far West.”⁵² Van Schaick reported to the Dublin Quakers that among the latest contributions received was \$170 from “the children of the forest, our red brethren of the Choctaw nation.”⁵³ The committee collected donations not only from residents of New York City, but from other parts of the New York state, and from Irish relief committees, individuals, and groups as far west as Wisconsin and Oklahoma.

Responding to the appeals from the Albany Irish Relief Committee, General Committee in New York, and Washington meeting, communities throughout New York state organized Irish and Scottish relief committees. Utica Irish Relief Committee sent 500 barrels of kiln dried corn as their “little contribution” ...”to alleviate...the sufferings of our brethren, the afflicted people of Ireland.”⁵⁴ Horatio Seymour, future governor, served on the executive committee of the Utica group. Rochester Irish Relief Committee forwarded “988 barrels of Indian meal, 30 barrels of flour, 13 barrels of Indian corn, 2 barrels of wheat, and three boxes of sundries” for Irish relief. According to the Rochester Irish Relief Committee, “these contributions have come from all classes of our citizens, rich and poor, in money, grain, and other articles....,” and “they have been most cheerfully made.”⁵⁵ In Binghamton two meetings were held for Irish relief. A group of ten women sent out the first public notice “to call the attention of the ladies and gentlemen of Binghamton and its vicinity to the deplorable picture of the suffering of the people of Ireland.”⁵⁶ Citizens contributed \$360 with a large donation from the village’s Odd Fellows. At the second public meeting, many in the audience had “the weather-beaten faces of mechanics and Irish laborers.” Two hundred dollars was collected and eighty dollars from “laborers on the Railroad.”⁵⁷ Residents of Brooklyn sent two “Brooklyn Ships,” *Patrick Henry* and *Ann Maria*, with biscuits, cornmeal, corn, wheat, and rye, “to alleviate the miseries of a few of the many sufferers of your devoted countrymen.”⁵⁸ The residents of Oswego “made a noble rally for the relief of famine-stricken Ireland,” and at their public meeting “crowded to overflowing” citizens donated over \$1,000. A local newspaper boasted “in proportion to the population and means of Oswego, her subscription is larger than has been made anywhere.”⁵⁹

Newspaper editors encouraged public meetings for Irish and Scottish relief, and in virtually every village, town, and city in New York citizens met to establish local relief committees to collect money, provisions, and clothing for the Irish, and secondarily for the Scots. Communities competed to show they had done their duty to help the Irish and Scots, as the Oswego newspaper claimed. Clergymen of every denomination took an active role in soliciting donations from their congregations. Political leaders, whether Democrat or Whig, endorsed the campaign for Irish relief, including future president Millard Fillmore who served on the Buffalo Irish Relief Committee. Nationally, several future presidents gave their mite for the Irish, including James Buchanan, Abraham Lincoln, Andrew Johnson, and Rutherford B. Hayes.

New York played an important role in the national movement to help the Irish as the United States became the leader in voluntary international philanthropy. More ships left New York City carrying relief supplies to Ireland and Scotland than any other American port. New York’s Irish Relief Committee collected \$242,042.79 in money, food, and clothing. the largest amount of any relief committee in the United States.⁶⁰ During the food shortages in Ireland in the early 1860s, the New York Irish Relief Committee, led by Judge Charles Patrick Daly, emerged in 1863 as the leading Irish relief committee. Once again, during the “Little Famine” of the late 1870s and early 1880s New York City became the center of Irish relief efforts. Judge Daly assumed leadership of a new Irish Relief Committee in December 1879, and James Gordon Bennett, Jr., editor of the New York *Herald*, created his own New York *Herald*

Irish Relief Fund in early 1880 as New York City once again emerged as the center role in the national campaign for Irish relief. The American warship *Constellation* left the Brooklyn Navy Yard carrying relief supplies, three quarters provided by three New Yorkers, Bennett, future vice-president and governor Republican Levi Morton, and the future mayor of New York William Grace, a Democrat and the first Irish Catholic to hold the office. When *Constellation* left for Ireland in late March it had to lower its topgallant mast because of a new impediment---the Brooklyn Bridge.

The Great Irish Famine had a direct impact on New York---it fundamentally altered the religious and ethnic make-up of the state. By 1860, Irish Catholics made up 40% of Troy's population and about 55% of Albany's population. Over 200,000 of New York City's population of 800,000 arrived from Ireland making New York the most Irish city in the nation. Across the East River, 57,000 of Brooklyn's 205,000 people came from the Emerald Isle, making Brooklyn the home of the third largest Irish community in the country.

¹- "Meeting of the Jewish Population of New York in Aid of Ireland," *Occident* 5:1 (April 1847), 37.

²-Charles Jenkins, Chairman, Irish Relief Committee, Albany to the Society of Friends, Dublin, 28 April 1847, in Albany Committee of Irish Relief Papers, Albany Institute of History and Art, Albany, New York. For another copy, Central Executive Committee of the State of New York to Archbishop Daniel Murray, 27 April 1847, CUL/NC/4/1847/22 Pontifical Irish College, New Cullen Collection, Archives, Rome, Italy; Charles Jenkins, Central Executive Committee to Most Rev. Mr. Croly, Archbishop of Armagh, 27 April 1847, 33/6/7, Archbishop Murray Papers, Diocese of Dublin Archives, Dublin, Ireland. Published copy in Society of Friends, *Transactions of the Society of Friends During the Famine in Ireland* (Dublin: Edmund Burke, 1996 reprint of 1852 First Edition), 239.

³-Allan Nevins, ed., *Diary of Philip Hone* (Kraus Reprint: New York, 1981. Original published in 1927), 792.

⁴-Jacob Harvey to William Pim, 30 March 1847, Pim MSS 8668, 521, National Library of Ireland, Cited in Helen Hatton, *The Largest Amount of Good* (McGill-Queen's University Press: Kingston and Montreal, Canada, 1993), 115 and note 31, 302.

⁵-Washington *National Intelligencer*, 12 February 1847.

⁶-Rochester *Democrat*, 14 November 1846.

⁷-Ibid, 14 November 1846. Also, see Rochester *Daily Advertiser*, for the same time period.

⁸-Jonathan Pim to Jacob Harvey, 3 January 1847, Folder 13, Box 6, Series II, Harvey Family Correspondence, Jacob Harvey Family Papers, MS 306, New York Historical Society.

⁹-For an earlier request, see Jonathan Pim to Jacob Harvey, 3 December 1846, in *Transactions*, 216-17. The source for the citation, Jacob Harvey to Jonathan Pim, 28 December 1846, *Transactions*, 217.

¹⁰-Ibid, 218.

¹¹-Jacob Harvey to Jonathan Pim, 5 January 1847, *Transactions*, 220.

¹²-New York *Evening Post*, 21 January 1847. A letter from Jacob Harvey to the editors. Also, see Harvey's defense of the poor Irish contributions in New York *Tribune*, 8 February 1847; Jacob Harvey to the Editors of the *Journal of Commerce*, 23 January 1847; Jacob Harvey to the Editor of the *Limerick Chronicle*, 6 January 1847. Copies of these newspaper letters by Harvey can also be found in Folder 25, Box 6, "Newspaper Clippings," Series II, Harvey Family Correspondence. Jacob Harvey Family Papers, MS 306, N-YHS.

¹³-Rochester *Democrat*, 6 February 1847.

¹⁴-Brooklyn *Daily Eagle*, 5 February 1847. Brooklyn was a separate city, and one of the largest in the US, until 1898 when it became part of the Greater City of New York.

¹⁵-Troy *Daily Post*, 5 March 1847.

- ¹⁶-West Troy *Advocate*, 13 January, 17 February, 10 March 1847.
- ¹⁷-Buffalo *Courier*, 12 February 1847; Herkimer *Journal*, in *ibid*, 20 January 1847.
- ¹⁸-Central Executive Committee (Charles Jenkins, et. al.) Albany, New York, to Rev. Michael Slattery, Archbishop of Cashel, 27 April 1847, Albany Committee for the Relief of Ireland Papers. Albany Institute of History and Art, Albany, N.Y.
- ¹⁹-Jersey City *Sentinel*. 1 December 1846.
- ²⁰- Brooklyn *Daily Eagle*, 30 November 1846.
- ²¹-*Ibid*, 28 December 1846.
- ²²-New York *Evening Post*, 28 December 1846; New York *Semi-Weekly Tribune*, 6 January 1847.
- ²³-George Trimble and Samuel Willetts, Rose Street Meeting of Friends, to Jonathan Pim, 16 January 1847, *Transactions*, 233.
- ²⁴-Henry Crosby Forbes and Henry Lee, *Massachusetts Help to Ireland During the Great Famine* (Milton, MA: Captain Forbes House, 1967), 8.
- ²⁵-Binghamton *Courier*, 3 February 1847.
- ²⁶-Oswego *Palladium*, 2 February 1847.
- ²⁷-Rochester *Democrat*, 11 February 1847.
- ²⁸- For the original petitions from New York City and other port cities see, for example, National Archives, Records of the U.S. Senate. Petitions Laid Upon the Table (Sen. 29A-H7), Record Group 46.
- ²⁹-Washington *National Intelligencer*, 16 February 1847. See letter to the editor from "A Trojan."
- ³⁰-Report of the Proceedings of a Public Meeting held at Washington for the Relief of the Suffering Poor of Ireland, *National Era*, 18 February 1847; *Transactions*, 224-227; Washington *National Intelligencer*, 12 February 1847. For copies of the original resolutions, see Daniel Webster Papers, 9 February 1847 on microfilm edition, Reel 20, 027623-36. The Webster Papers are at Dartmouth College, and I used a copy at the Firestone Library, Princeton University.
- ³¹-For the original copies of the bills, Original Senate Bills and Resolutions, 29th Cong.2nd Session, (S184-Sen 29A-B4), Records of the Senate, Record Group 46, NA; For President Polk's threat of veto, Milo Qualify, ed., *The Diary of James K. Polk During His Presidency, 1845-49* (Chicago: A.C. McClurg and Co., 1910), Vol II, 2 March 1847, 307-08. For secondary accounts of the Congressional debate, Timothy Jerome Sarbaugh, "A Moral Spectacle: American Relief and Famine, 1846-49," *Eire-Ireland 15:4* (Winter, 1980): 6-14 and "Charity Begins at Home," *History Ireland 4:2* (Summer 1996): 31-35. The author of this article has written an article, "Warships as Messengers of Charity" that he has submitted for publication.
- ³²-Christine Kinealy, *Charity and The Great Hunger in Ireland: The Kindness of Strangers* (London and New York: Bloomsbury Publishing, 2013), 242-250. Unfortunately, Senator Fairfield's Papers at the Maine Historical Society in Portland and at the Library of Congress do not contain details of the Dix-Fairfield collaboration for Irish relief. Maine Historical Society kindly sent me copies of his papers and the Library of Congress loaned me a reel of microfilm copies of his papers.
- ³³-See Forbes and Lee, *Massachusetts Help*, 27-35; Phyllis DeKay Wheelock, "Commodore DeKay and Voyage of *Macedonian* to Ireland," *American Neptune*, 13:4 (October 1953):252-69; James DeKay, *Chronicles of the Frigate Macedonian. 1809-1922* (New York: W.W. Norton, 1995).
- ³⁴-Albany *Evening Journal*, 9 February 1847.
- ³⁵-Albany *Evening Atlas*, 6 February 1847.
- ³⁶-Albany *Evening Journal*, 13 February 1847.
- ³⁷- "Legislative Relief Meeting," and "Relief to Ireland," 15 February 1847, Broadside, 2086, Manuscript Division, New York State Library, Albany, N.Y.; Amy Bascom, Chair, Legislative Committee to Charles Jenkins, 8 March 1847, Albany Irish and Scottish Relief Committee, AIHA. For Buffalo's refusal to vote Irish aid, Buffalo *Courier*, 6 March 1847. For Rochester, New York *Freeman's Journal*, "P" Rochester, 22 February 1847 in the issue, 6 March 1847.
- ³⁸-For New York City's donation, James Stowall, et al, to the Central Relief Committee, 31 May 1847, *Transactions*, 244; *Proceedings of the Board of Aldermen, Vol. XXII, 23 November 1845-10 May 1847* (New York: William C. Bryant, 1847), 351 (1 March), 618. 623 (1 April 1847).

³⁹-Kinealy, *Charity and the Great Hunger in Ireland*, 101.

⁴⁰-For a more detailed account of the Albany committee, see this author's "Famine Relief from an Ancient Dutch City," *The Hudson River Valley Review*, 22:2 (Spring 2006): 1-27. I used the box and a half of surviving correspondence and accounts at the Albany Institute of History and Art. Apparently, the original records of famine relief committees in United States have survived for the New England committee at the Massachusetts Historical Society in Boston and Portland committee at the Maine Historical Society. Printed reports survived for the New York City, New Jersey, Charleston, Philadelphia, and Philadelphia Quaker committees.

⁴¹-Charles Jenkins, Chairman, Irish Relief Committee, Albany to Society of Friends, Dublin, 28 April 1847, *Transactions*, 239. The original handwritten letter is in the Albany Institute.

⁴²-Edwin Thomas, Buffalo Committee to Charles Jenkins, 14 April 1847, as one example, Albany Irish Relief Committee, AIHA.

⁴³-Robert Minturn to Charles Jenkins, 11 May 1847 and Memorandum of Investment of Albany Funds by the New York Committee to Aid Ireland. Albany Relief Committee, AIHA; Myndert Van Schaick, Chairman, Irish Relief Committee, New York to Joseph Bewley and Jonathan Pim, 22, 26 May 1847, about the "Albany" ships in General Irish Relief Committee, *Aid to Ireland: Report of the General Relief Committee of the City of New York* (New York: The Committee, 1848), 91, 94. New York Public Library on 42nd Street owns a printed copy and NYPL, NYHS and NYSL own microfilm copies. Copies available also online Google. Citation of the Dublin Quakers: Joseph Bewley and Jonathan Pim to Myndert Van Schaick, Chairman, Irish Relief Committee, New York, 3 June 1847, *Transactions*, 293.

⁴⁴-Christine Kinealy, *Charity and the Great Hunger in Ireland*, 102.

⁴⁵-For an account of New York City's role, Christine Kinealy, *Charity and The Great Hunger in Ireland*, 85-106; John Ridge, "The Great Hunger in New York," *New York Irish History* 9 (1995):5-12; Harvey Strum, "ThirtyDollarsfromLittleBeckie: NewYork'sIrishFamineReliefEfforts, 1846-1847," *Seaport*, 35 (Fall 2000):30-34.

⁴⁶-Allen Nevins, *Phillip Hone*, 788; *New York Mirror*, 15,17 February 1847; *Aid to Ireland*, 8.

⁴⁷-Allen Nevins, *Phillip Hone*, 789-90; *Aid to Ireland*, 9.

⁴⁸-Allen Nevins, *Phillip Hone*, 790; *New York Journal of Commerce*, 15 February 1847; *New York Evening Post*, 15 February 1847.

⁴⁹-Allen Nevins, *Phillip Hone*, 792; *New York Freeman's Journal*, 6 March 1847.

⁵⁰- "Meeting of the Jewish Population of New York in Aid of Ireland," *Occident* 5:1 (April 1847),37.

⁵¹-*Aid to Ireland*, 9.

⁵²-*Ibid*, 6. The report lists virtually everyone and every community that donated.

⁵³-M. Van Schaick, Chairman, Irish Relief Committee, New York, to Jonathan Pim, 19 May 1847, *Transactions*, 147.

⁵⁴-Edward Wetmore, et al, Irish Relief Committee, Utica, New York to Jonathan Pim, 8 May 1847, *Transactions*, 241.

Unfortunately, the Horatio Seymour Papers at the New York State Library contain nothing about his contributions to famine relief in 1847, 1863 or 1880. The Oneida County History Center in Utica has no Seymour material relevant to 1847, but has a copy of a pamphlet from 1880 when once again Seymour joined in a campaign for Irish relief.

⁵⁵-L.A. Ward, Chairman. Ex-Committee, Irish Relief Committee, Rochester, New York to Jonathan Pim, 10 December 1847, *Transactions*, 250-51.

⁵⁶-*Binghamton Courier*, 10 February 1847. It was unusual in 1847 for women to initiate a call for a public meeting for Irish relief.

⁵⁷-*Ibid*, 17 February 1847.

⁵⁸-William Harris, et al, Irish Relief Committee, Brooklyn to Jonathan Pim, 11 May 1847, *Transactions*, 242.

⁵⁹-*Oswego Palladium*, 22 February 1847. For further details of the meeting, 23 February 1847.

⁶⁰-*Aid to Ireland*, 65.

How to Use Videos in Preparing Teachers

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With all the changes ushered in by the new millennium, this is a time of transformation in teacher preparation and opinions on what counts as competent teaching evidence. Video is playing a vital role in these new developments. Video technologies are being used increasingly in preparing novice teachers, documenting and illustrating classroom practices, recording and presenting exemplary teachings, and allowing teacher candidates to reflect on their own and others' teaching practices (Darling-Hammond, 2010; Erickson, 2007). Video also can function as a tool for teacher assessment and certification in the context of edTPA (Teacher Performance Assessment), the new subject-specific assessment measure (Chiu, 2013; Madeloni & Gorlewski, 2013).

Stanford University and the American Association of Colleges for Teacher Education (AACTE) formed a partnership to develop edTPA, which is designed for determining whether or not new teachers are ready to enter the profession with the skills necessary to teach effectively. There are currently 929 educator preparation programs in 41 states and the district of Columbia participating in edTPA (edTPA, 2019). An innovative feature of edTPA is the requirement that teacher candidates submit a video of themselves teaching as part of their portfolio. Many kinds of research have examined the uses and impacts of edTPA (Clayton, 2018a; Greenblatt, 2017; Mileta, 2014; Paugh et al., 2018). I take a neutral position towards edTPA's political controversies, the purpose of this study is on how video can function as a tool to impact teachers' professional development and bring out some useful insights for teacher preparation program.

Using Video in Teacher Education Program

Since the mid-1960s, educators from Stanford University began to examine videotape-recording technology applications in teacher education (McCurry, 2000). Many researchers have studied the use of videotaping with both pre-service (Santagata et al., 2007; Star & Strickland, 2008) and in-service (Pucel & Stertz, 2005; Maclean & White, 2007) teachers. Anderson et al., (1990) reported that over 98% of North American schools had videotaped teachers' classroom practices, but only around 35% of pre-service and in-service teachers felt they had benefitted from that videotaping.

Positive Effects

Blomberg et al. (2013) discussed the strengths and limitations of using video in the teacher preparation program. The authors suggested that video technology should be used in teacher education; however, they argued that well-founded knowledge and understanding of the proper use of video as a technological tool in teacher candidate education is still lacking. Therefore, more research-based experimental studies still need to be conducted to find the advantages and disadvantages of using videos in teacher preparation programs.

Video techniques have been used in many different ways of preparing future teachers. Firstly, video can be used to record teaching examples, reappear classroom episodes, and reflect on teaching practices. In these ways, video can be used as a tool for developing flexible pedagogical thinking. As I concluded in another paper (2018), *The Use of Video as a Tool for Reflection with Preservice Teachers*,

Video reflection has the significant advantage of grounding reflection in an actual instance of teaching. Moreover, the incorporation of video into reflection assignments opens the door to reflection in action, rather than merely reflection on action. Video-based reflection is also more conducive to a type of reflection that is forward-looking. (Xiao & Tobin, 2018, pp. 341-342)

Using video to help enhance teacher candidates' reflection in their practice facilitates novice teachers' professional development and is a productive tool for fostering thinking about teaching and learning. Positive effects similar to these can be founded throughout the literature (Bulter, 2020; Clayton, 2018a; Paugh et al., 2018).

Secondly, video is a powerful tool to improve teachers' professional vision. Rich and Hannafin (2009) introduced video annotation tools that "allow an individual to both capture and analyze video of personal teaching practice, enabling teachers to review, analyze, and synthesize captured examples of their teaching in authentic classroom contexts" (p. 53). It offered the potential to analyze one's teaching and the ability to associate teaching practices captured on video with other evidence of teaching and student learning. Greenwalt's (2008) studied the teacher candidates' opinions about the videotaping and analysis of their instruction as part of their coursework. The author suggested that the use of videotapes in teacher candidate education "can either facilitate or disrupt the workings of power in the formation of teacher identities" (p. 398).

Negative Influences

Being videotaped as part of an evaluation is quite different; however, it will place the teacher candidates under more pressure and scrutiny. Jamil and Pianta (2015) reviewed the current teacher assessment tools that have been used in North America. They expressed their concerns that the inclusion of video as an integral component of teacher performance assessments like edTPA, while adding to the richness of the data, also presents further challenges for teacher candidates and teacher preparation programs. Video methods can bring negative influences to teachers' performance and teacher preparation programs. One concern is how much and in what ways people change their behaviors in front of the camera. Using videos as an assessment tool, the camera can capture teacher candidates' unpremeditated and spontaneous actions. However, as Møhl (2011) argued, the camera makes people change differently, which helps understand why teachers may appear to perform better or worse or simply different in their videos because of their conscious effort to perform like an effective teacher.

Borko et al. (2009) investigated how new technologies—particularly video and online communities—inform teacher candidates' understanding of real classroom issues and improve their professional development. Integrating technology into the curriculum requires the teachers to acquire the knowledge and skills of using technologies in teaching, which is a challenge for teachers, teacher educators, and teacher preparation programs because not everyone is tech-savvy. Teacher preparation programs need to allocate time for integrating the technologies into the curriculum to support teachers' professional development.

Fuller and Manning (1973) raised the problem of "self-confrontation"; they argued that reviewing the video of oneself teaching is a self-confrontation process, which is difficult, stressful, and painful for some teacher candidates. The overly self-critical and focus too much on the physical appearance may lead to reduced self-esteem and confidence. This research was conducted around five decades ago; the result may not experience self-confrontation trauma because video techniques are common in daily life. However, not all researchers regard this "self-confrontation" as a drawback. McCurry (2000) stated that even though teacher candidates may receive positive and negative feedback from their peers, this feedback is still valuable and will occasion behavior modification because these teacher candidates face the same issues, share a sense of empathy, and learn from each other.

Research Design

The 23 participants are the first cohort to get a teaching license through the edTPA project in an initial early childhood teacher certification program. To prepare these teacher candidates for the edTPA project, they are required to videotape themselves teaching and submit a reflection paper both on their teaching experience and on the video of the lesson at midterm and final as a part of their coursework. After collecting the videos and reflection papers, the researcher conducted the video-cued focus-group interviews with the teacher candidates, instructors, and university supervisors.

Results and Discussion

This article focuses on the videotaping itself and the impacts, both positive and negative, of adding a video assignment to an early childhood education teaching methods course.

Positive Outcomes of Videos

Reflecting on the Teaching Practice

Videotapes of teaching can be watched repeatedly, allowing teacher candidates to re-experience and retrospectively assess their teaching. During such repeat-viewing sessions, they notice things they did well and things they did awkwardly, as well as aspects of their students' engagement they missed while teaching the lesson. Hayashi and Tobin (2015) suggested that teacher candidates tended to rush during their teaching. They feel pressure to finish their lesson plan on time, which leading them to provide inadequate and unclear directions, not give students enough waiting time, or speak too much during the lessons. The videos recorded these moments, and teacher candidates can reflect on these issues. The videotaping of lessons provides a mechanism for teacher candidates to review these moments and rethink their teaching techniques. Another aspect of teaching is how teachers make in-the-moment decisions. Videotaping gives teacher candidate a chance to re-experience moments where the flow of a lesson broke down and to think about whether the decisions they made at the moment were appropriate or not. Reviewing the videos gives them a chance for reflecting, which is a key process of learning from experiences and developing practical knowledge.

In the Early Childhood Education teaching methods course, the instructors talked a lot about the differences between teacher-centered and children-centered pedagogy and encouraged teacher candidates to use more child-centered approaches. Most of our teacher candidates seemed to understand and agree with this idea in principle but struggled to follow its practice. As one participant reflected: "I also realized towards the end of my video that instead of allowing my students to think about the colors and animals they have learned, I was doing all the leading." The teachers also tried to finish the lesson as soon as possible and didn't give students enough time to think and respond. Pacing, wait-time, and balanced input from the teacher and students are key aspects of teaching that are more accessible in videos than in journal reflections or even direct teacher candidates' observations by university supervisors.

Using Videos in the Teaching Methods Course

For teacher candidates to get the most benefit from the edTPA videotaping requirement, their instructors must scaffold their learning with these videos. The teacher candidates and their instructor can review the videos together, identify effective teaching examples, and then reflect and practice these effective techniques. Or the teacher candidates can share their videos with the whole class, talked about key teaching moments, and encouraged classmates to offer their feedback.

Besides, video-cued practicing would probably be most effective if done in the context of role-playing a classroom. Teacher candidates can share the videos they have issues with their classmates and role-play the strategies to deal with them. In this study, teacher candidates did some role-playing, and several of them discussed the value of role-playing for revising their lesson plans and practicing their teaching techniques. Some participants said that the suggestions classmates gave them were very beneficial. One teacher candidate said in an interview, "I think that was my favorite part about the assignment, was that, realistically."

The videotaping assignment also is a useful tool for facilitating communication between teacher candidates and their supervisors. Some missed details can be captured on video; teacher candidates and supervisors can review the video and discuss the lesson's issues. Additionally, the teacher candidates can explain the classroom context and share their thoughts about the lesson with their supervisors, which can facilitate the process of revising their teaching for improvement.

Negative Effects of Videos

Reactions of Self-confrontation and Self-criticism

Fuller and Manning (1973) suggested that young teacher candidates view a video of themselves' teaching is a process of "self-confrontation." In contrast to their study, I found little evidence of "the trauma of self-confrontation" among my participants. Some teacher candidates commented at the beginning of the semester that they felt awkward at the prospect of being videotaped and reviewing videos of their teaching. But most attributed this awkwardness to the newness of the task. Some students in the teaching methods course said that it "felt weird" to see themselves as a video character. The version of themselves they saw in the video could either be better or worse than their imagined self. I don't count such comments as evidence to support Fuller and Manning's self-confrontation concept because these teacher candidates recovered from these

negative feelings very quickly and moved on to how the videos could be used to improve their teaching skills and capture what they failed to notice while teaching the lesson.

Some participants reported that watching videos of themselves teach produced embarrassment. Especially when they encountered problems or dilemmas in their teaching or controlled students' misbehavior, I also view such reflections positively because these reflect that teacher candidates are awaking their emotions can influence their student's behaviors. This awareness led them to strive to maintain a positive demeanor. Even though some teacher candidates feel frustrated to manage their emotions/expression, these negative feelings did not make negative comments on videotaping experiences or make them lose confidence in future teaching.

Overly Performative Teaching

The teacher candidates are eager to focus on behaving in ways that make them appear professional. Once they have entered their teacher preparation programs, they have learned to act or perform in a way that is recognized as fulfilling an effective teacher's role. When teacher candidates are not directly observed or recorded, they naturally feel a greater sense of freedom to explore their teaching style and personality; however, when under surveillance (by camera or supervisors), there tends to be a heightened sense of anxiety about appearing "teacherly" and "professional." Thus, some teacher candidates speak, dress, and move in ways that they think will make them appear adequately professional. This is a result of both of their desire to be continuously seen as doing something visibly "teacherly" and, in the case of the participants, that if they moved too much, they would leave the frame of the camera, which was fixed on a tripod.

When I compared my analysis of their videos with my observations on the days when I visited student teachers' classrooms, I concluded that they tended to modify their behavior in front of the camera, such as using overly-formal speech during teaching. A few teacher candidates were aware that they were acting unnatural, stilted, or overly performative in their videos and reflected that in their papers. However, most of the pre-service teachers seemed to be unaware when they reviewed their videos of this tendency towards hyper-performativity. Nevertheless, compare the videos throughout the semester, this teacherly or performative teaching decreased.

Technical Issues

Teacher candidates ran into many technical challenges with the video assignment. The first challenge was choosing which equipment was most suitable for the task. Someone decided to use a "Swivel," a device turned out to be great for voice capture, but it also created unanticipated problems. The Swivel follows the wireless microphone on the teacher, but often cannot keep up with her. Moreover, if the teacher candidates shot their videos using an iPad or phone, the students could see themselves on the screen, which usually led students to wave or make faces.

Some participants decided not to use the Swivel, which left them without a wireless microphone; they were disappointed in the quality of the audio they recorded. When they taught a small group of children in a classroom with considerable background noise, their voices and/or the children's voices was often not audible. In some cases, the video included sounds from other groups of children. Whatever equipment choices were made, the children were curious about the camera, often requiring the teacher candidates to intervene. The teacher candidates also needed to think about the lighting of the classroom and the camera's location. Sometimes the lighting is poor, and the students may block the teacher candidate's face throughout the lesson. Or the camera angle is too low, so the materials on the table are not visible.

The most daunting technical problems turned out to be running low on battery and/or data, and some teacher candidates had to change their equipment in the middle of the lesson. Uploading video clips and sending them were also challenging for many of the teacher candidates. Some video recording formats were not compatible with their computer software. Others struggled with video file sizes that were too big for them to upload, send, or save. These technical problems impacted the reviewing and sharing of the videos.

Keeping the above considerations in mind, teacher educators need to make a serious effort to take account of both the challenges and the productive applications of video-recording as a dynamic pedagogical tool in teacher preparation—not only to satisfy mandatory certification procedures but more importantly, to explore a promising avenue for shaping the future of teacher education.

Conclusion

Video assessment requirements bring both positive and negative influences on teacher candidates' development. On the positive side, recording videos of lessons provides a mechanism for teacher candidates to reflect on their teaching practice. Video-cued reflection can give teacher candidates and their supervisors a way to recall events in student teaching, a shared text to use for classroom discussions, and track changes in their progress over a semester or program.

However, on the negative side, they may choose to emphasize those aspects that are easily filmed and select those video segments in which they appear most traditionally "teacherly." For example, they may choose to teach a small group instead of working with the whole class because videotaping the small group may be easier than capturing the entire classroom's dynamics. Also, when the teacher candidates recorded videos, they encountered technological problems.

For teacher preparation programs, this study holds important implications for using videos in the teacher preparation program, especially for those programs in implementing edTPA as their primary teacher assessment and certification measure. More research in the future will help determine more effective ways to help teacher candidates draw out the benefit of using video in the courses. For policymakers and educators, this research provides data on the positive and negative impacts of video assessment, mainly as implemented in edTPA. Whatever edTPA's shortcomings may be, video can play a vital role in teacher preparation programs. The video should be incorporated throughout the programs and not just introduced during student teaching due to graduation and certification requirements. In this way, pre-service teachers can become familiar with the technology, comfortable in front of the camera, and more accustomed to viewing and reflecting on their own and classmates' videos.

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