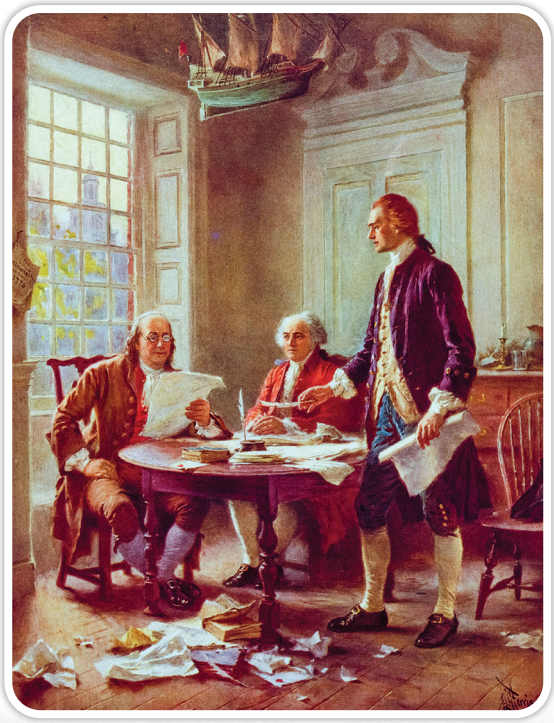
Louisiana High School U.S. History

Land of Liberty

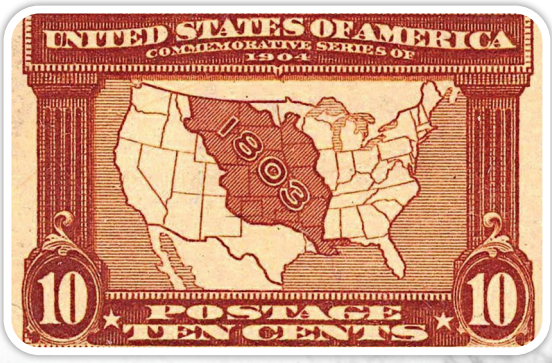
Student Volume 1

Telegraph



Declaration of Independence

Second Industrial Revolution



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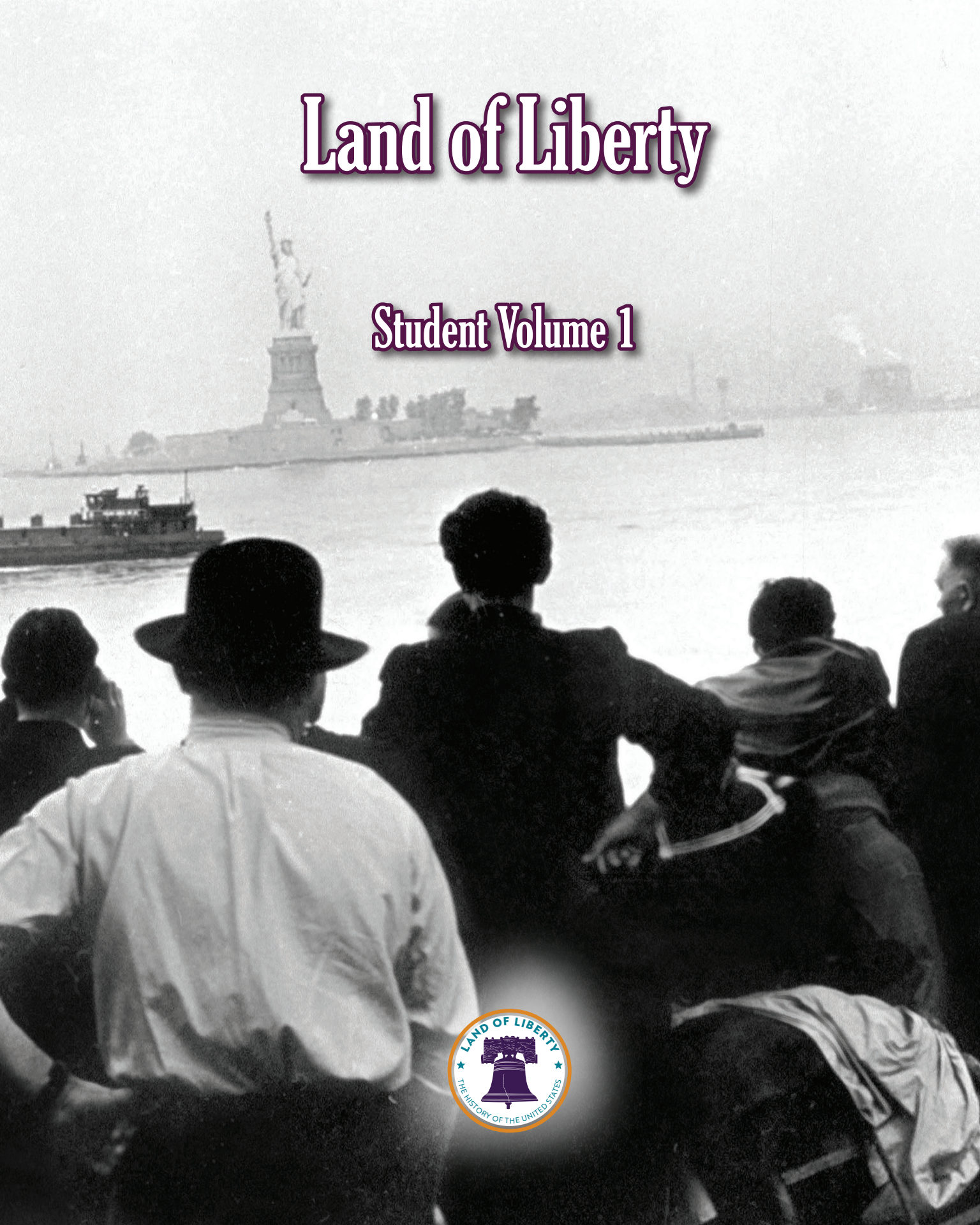

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Land of Liberty

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Unit 1: Founding and Early Development of the Nation

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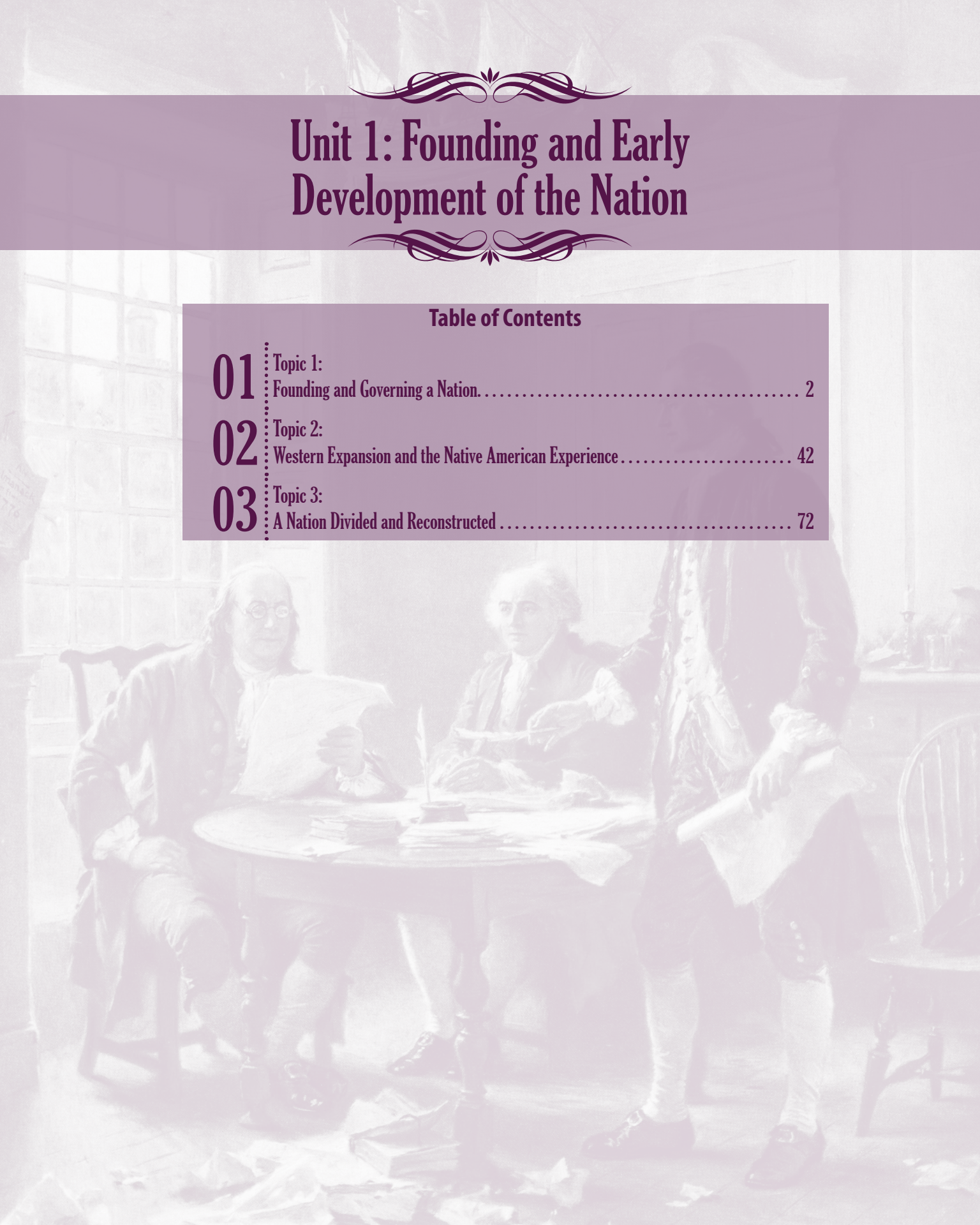


Topic 1
Founding and Governing a Nation

Framing Question

What ideas and events influenced the founding of the United States of America?

Later depictions of the Boston Tea Party, like this 1856 engraving, sometimes fail to capture the full scale of the protest. As many as a hundred people were involved, and the amount of tea destroyed was significant.

The Boston Tea Party

Setting the Scene

On the night of December 16, 1773, three ships lie at anchor in Boston Harbor, in the British colony of Massachusetts: the Dartmouth, *the* Eleanor, *and the* Beaver. *They and their freight are idle as a debate rages onshore. The residents of Massachusetts have demanded that the ships turn around without unloading the 340 chests of tea on board and return to Great Britain. The colonial governor, a British appointee loyal to the Crown, insists that the ships must be allowed to unload their cargo. Talks between the two groups have reached an impasse.*

One might wonder what sort of dangerous, controversial cargo the ships are carrying to create such a conflict. The answer is tea—one of the goods being taxed by the British government without any input from the colonists. Tea is a popular beverage in Massachusetts, but many colonists refuse to buy it from British merchants. They fear that doing so will show the British that they can tax the colonies as they please.

Dissatisfied with the governor's response, a group of colonists take matters into their own hands. Calling themselves the Sons of Liberty, they row out to the ships, climb aboard, and begin dumping chest after chest of tea overboard. The exact number of protesters—a few dozen to a hundred—will be lost to history, partly because they do not want to be identified. They know that British authorities will crack down on their protest, so they have disguised themselves, with some adopting the costume of the Mohawk people. The choice to dress as Native Americans is a symbolic one, reflecting a desire for a distinctly "American" identity in the face of British rule.

Over three hours, the disguised Sons of Liberty heave the chests of tea overboard: forty-six tons, worth about $1.7 million in today's dollars. As they row back to shore, the tea leaves mingling with the salt water of the Atlantic, they recognize that their conflict with the British authorities is far from over.

Before the Revolution

The discontent expressed by the Boston Tea Party protesters was the result of decades of growing tension between the American colonies and their British rulers. Since the establishment of Jamestown in 1607, British merchants, frontierspeople, and religious refugees had founded colonies along much of the North American coast, from present-day Georgia up to present-day Maine.

During the 1700s, Britain's monarchs continued to seek to expand their island country's large colonial empire. The kings of France were also trying to colonize North America and claimed much of the land to the north and west of the British colonies that were on the Atlantic coast. Conflicts between the two European rivals were frequent. Under George II, who reigned from 1727 to 1760, Britain became embroiled in a war with France known today as the French and Indian War (1754–63). This conflict, which began in North America, was part of a wider global conflict between Britain and France that also included the Seven Years' War (1756–63). The British, with the help of the German state of Prussia and other allies, won the war and gained control over much of France's former North American territory. The French, however, held on to a large part of what is now Canada.

George III took the British throne in 1760 and inherited the enormous debts that his country had incurred fighting France. He and his ministers felt pressure to make the American colonies more profitable. Together with **Parliament**, the British legislature, they passed a series of laws during the mid- and late 1760s to extract more and more money from the colonies via taxes.

To the colonists, these taxes were an unwelcome shift in British attention. For almost a century, the British government had generally followed a policy of **salutary neglect**: As long as the colonists remained loyal and profitable to Britain, the home country would allow the colonies to mostly control their own trade and regional governments. The new taxes were part of a shift toward tighter control in the 1760s that seemed oppressive—even tyrannical. For instance, the 1765 Quartering Act required the colonies to provide food, lodging, and other necessities for British forces

In practice and in principle, the quartering of British soldiers in the private homes of American colonists was deeply unpopular.

stationed in America. Because the colonies had long made their own rules about how to provide for troops, many viewed this as another example of Parliament's overreach.

Other new laws from Great Britain limited where the colonists could live. After originally settling near coasts, colonists wanted to move farther west. There, they believed, they could farm and live without other people's interference. However, the land was occupied by the Indigenous peoples who had long lived on the continent, and westward expansion created conflicts that often led to violence. The Proclamation of 1763, issued by the British king, was intended to prevent such conflict: It prohibited colonists from settling west of the Appalachian Mountains. This was another decision by the king and Parliament that led colonists to feel that they were being deprived of the "rights of Englishmen," or civil rights that they would enjoy if they lived in England.

Although the colonists were originally British subjects, they began to develop a different identity in the colonies. For many years, the colonists maintained a strong connection with Britain through ancestry, a common language, and shared values—including a belief in individual rights and a government that represented those beliefs and values. But over time, living an ocean apart had shaped their daily lives in different ways. Many colonists began to think of themselves less as British and more as something new—American. This burgeoning sense of independence, combined with frustrations over British control, deepened the divide between the colonies and the home country.

Think Twice

Why did the relationship between Great Britain and its American colonies deteriorate in the late eighteenth century?

Taxation Without Representation

Taxation remained the most visible symbol of British power over the colonies. Gradually, and over much protest from the colonists, Parliament developed a system of laws that imposed punitive taxes on the American colonies. Together, these laws sought to raise money, further assert British control over the colonies, and punish unruly colonists for past protests. Like other colonial powers before and since, Britain saw its colonies as a source of raw materials to expand its manufacturing industry and a source of **revenue** to expand its wealth. With substantial debts to repay, leaders in Parliament hoped that taxing the colonies would help balance Britain's national budget.

The new taxes targeted a wide variety of processed and manufactured goods. The Sugar Act (1764) enforced duties on the products of the Caribbean sugarcane trade: sugar, molasses, and rum. Other tax laws

affected the prices of essentials. For example, the Stamp Act (1765) levied taxes on printed documents and paper goods. The Stamp Act did not actually tax stamps, however; to show that the tax had been paid, printers had to have their publications *stamped* (embossed) with a special mark. Newspaper publishers and others protested this law by including a

PRIMARY SOURCE: DECLARATION OF RIGHTS AND GRIEVANCES, STAMP ACT CONGRESS, 1765

American colonists responded to Parliament's acts with organized protest. The Stamp Act Congress, which was formed to work toward the repeal of the act, passed this Declaration of Rights and Grievances in response.

The members of this congress, . . . having considered as maturely as time would permit, the circumstances of the said colonies, esteem it our indispensable duty to make the following declarations, of our humble opinion, respecting the most essential rights and liberties of the colonists, and of the grievances under which they labor, by reason of several late [recent] acts of parliament. . . .

2d. That his majesty's liege subjects in these colonies are entitled to all the inherent rights and privileges of his natural born subjects within the kingdom of Great Britain.

3d. That it is inseparably essential to the freedom of a people, and the undoubted rights of Englishmen, that no taxes should be imposed on them, but with their own consent, given personally, or by their representatives.

4th. That the people of these colonies are not, and from their local circumstances, cannot be, represented in the house of commons in Great Britain. . . .

Lastly, That it is the indispensable duty of these colonies to the best of sovereigns, to the mother country, and to themselves, to endeavor, by a loyal and dutiful address to his majesty, and humble application to both houses of parliament, to procure the repeal of the act for granting and applying certain stamp duties, . . . and of the other late acts for the restriction of the American commerce.

Source: Niles, Hezekiah, ed. *Principles and Acts of the Revolution in America*. Baltimore: W. O. Niles, 1822, p. 457.

skull-and-crossbones figure where the stamp was supposed to go.

It is important to understand that the legislature in each of the colonies represented the people. Some, like the House of Burgesses in Virginia and the General Court in Massachusetts, had existed for more than a century. They were accustomed to making their own rules for internal affairs, with less interference than they now faced from Parliament. These colonial governments soon expressed their **dissent** with the tax laws. In May 1765, the House of Burgesses passed a measure in protest of the Stamp Act. In it, the burgesses (colonial legislators) argued that Parliament had no right to impose such a tax on its American subjects and that only they, the Virginia assembly, had the "sole exclusive right and power to lay taxes" on the people of Virginia. Later that year, in October, a group of representatives from across the colonies met

Events Leading Up to the American Revolution

- **1607:** First permanent British colony is established at Jamestown.
- **1727:** George II becomes British king.
- **1754–63:** French and Indian War takes place.
- **1760:** George III becomes British king.
- **1763:** Proclamation of 1763 is issued.
- **1764:** Sugar Act is passed.
- **1765:** Quartering Act and Stamp Act are passed.
- **1766:** Declaratory Act is passed.
- **1766:** Stamp Act is repealed.
- **1766–67:** Townshend Acts are passed.
- **1770:** Boston Massacre takes place.
- **May 1773:** Tea Act is passed.
- **December 1773:** Boston Tea Party takes place.
- **March–June 1774:** Intolerable (Coercive) Acts are passed.
- **September 1774:** First Continental Congress meets.

Many events that took place in the years leading up to the American Revolution involved the passage of laws by the British Parliament that the American colonists found repressive, unfair, and often offensive.

as the Stamp Act Congress and issued their own Declaration of Rights and Grievances. The Stamp Act Congress was an important early example of cooperation among the colonies to protest what they viewed as British oppression.

Parliament gave in and **repealed** the Stamp Act. At the same time, the Declaratory Act was passed, stating that the British Parliament was able to legislate for the colonies "in all cases whatsoever." Parliament then imposed new controls in 1766 and 1767 with the Townshend Acts. These laws levied taxes on glass, lead, paint, paper, and tea—all goods that the colonists imported rather than produced themselves.

The American colonists objected to these new taxes in large part because they imposed "taxation without representation." The colonies had no representatives in Parliament who could voice their concerns. For the colonists, British taxes were the ultimate proof that colonial views were unrepresented and disregarded.

Think Twice

What is taxation without representation, and why was it a source of conflict between the American colonists and the British government?

Colonists Push Back

Colonists expressed discontent with British taxes through protest—primarily by boycotting the taxed goods. They did without the goods, found substitutes (such as coffee instead of tea), or turned to smugglers to fulfill their needs.

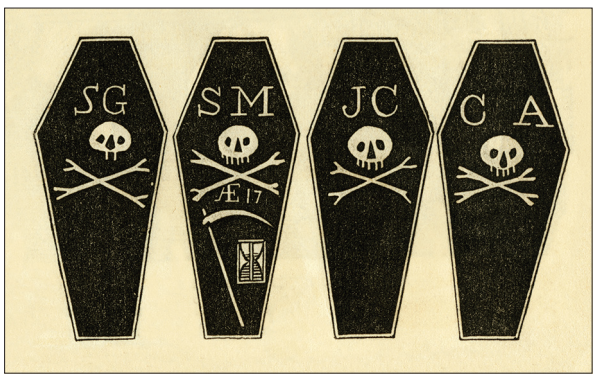
As tensions rose, violence became more likely. On March 5, 1770, a British soldier on guard duty in the colonial Massachusetts city of Boston, surrounded by a crowd of hostile Bostonians, called for reinforcements. Once British troops arrived, they began firing on the crowd, killing five American colonists. It is unclear exactly why the soldiers opened fire. The colonists insisted that the British troops fired without reason; the British soldiers later testified that they were assaulted by a crowd of people throwing snowballs, oyster shells, stones, and clubs and were fearful for their lives. Among the five dead was Crispus Attucks, an African American dockworker who had joined others of his trade in protesting British import laws. Attucks is considered the first American to have died in what would become known as the American Revolution.

The bloodshed in Boston could have easily devolved into an all-out battle. As it happened, most British troops in Boston withdrew to a nearby fort before this could occur. The soldiers who had fired on the crowd were jailed and put on trial soon after, and two were punished for manslaughter (a lesser charge than murder). Even so, resentment of the redcoats—as British troops were called due to their red uniforms—rose to ever-greater levels.

Paul Revere's Engraving

An early advocate of American independence named Paul Revere made the most of the tragedy in Boston by turning it into a propaganda moment. The Massachusetts silversmith and engraver published an illustration of the violence that put the blame solely on the redcoats. He referred to the incident as the *Boston Massacre*. Revere's illustration helped raise the indignation of his fellow colonists.

Meanwhile, Parliament continued to issue new laws that the colonists deemed unjust. These included the Tea Act (1773), the law that would become the focus of the Boston Tea Party protesters' anger and frustration. This legislation reduced the amount the struggling British East India Company paid in taxes. Parliament hoped to **subsidize** British tea by inducing American colonists to buy the now-cheaper tea and, in the process, pay colonial taxes. Yet for many colonists, buying this British tea was an acknowledgment that the British government had the right to tax them in the first place.



This 1777 illustration shows the initials of four of the Boston Massacre victims. *CA* represents Crispus Attucks.

Despite the heightened tension in the colonies, Parliament enacted laws that made the situation worse. In 1774, Parliament passed laws designed expressly to punish Massachusetts colonists for their role in the Boston Tea Party. Colonists referred to these laws as the Intolerable Acts. Also known as the Coercive Acts, the new laws authorized a blockade of Boston Harbor. Parliament claimed the blockade was done for the safety of merchants, but it was actually a way to punish Bostonians. Other measures allowed British authorities to circumvent Massachusetts's

This is a rendition of the Gadsden flag, which was first hoisted during the American Revolution. It and its message became a symbol of Americans' unity and determination.

colonial government and appoint their own sheriffs, judges, and jurors. Parliament was indeed tightening its grip on the colonies. Colonists debated how they might restore the largely **autonomous** self-government they had enjoyed just a decade or two prior.

Think Twice

What actions did colonists take to oppose British laws before the American Revolution?

The Colonies Unite

In September 1774, delegates from twelve of the thirteen colonies (all but Georgia) met to discuss their response to these new, punitive laws. They called their group the First Continental Congress and formally decided that the colonies would resist importing goods from Britain.

Many in the colonies began to sense that a war was likely, and they debated whether to attempt to appease the British or prepare to fight. *Loyalists* held that Britain had a right to govern the colonies, and they sought to remain loyal subjects of the British Crown. Their goal was to reconcile with the king and Parliament and remain a part of the British Empire. The group we now know as the *Patriots* argued that Britain had no or limited right to govern them. Gradually, they came to call not just for greater autonomy in colonial government but for total independence from British rule.

In New England, both colonists and British forces were already preparing for war. British troops occupied Boston and commandeered colonial supplies. Colonists responded by creating their own **militias** to fight back if needed. The militia in Massachusetts was to be ready "at a minute's notice," earning them the now-famous nickname *minutemen*.

It took only a few months for the minutemen to see action. On the night of April 18, 1775, British troops marched west from Boston. They were headed toward Concord, where they believed a colonial armory was located. Their mission was to seize the militia's weapons. In the morning, about eight miles (13 km) before they reached Concord, the British soldiers found

PRIMARY SOURCE: "GIVE ME LIBERTY, OR GIVE ME DEATH," PATRICK HENRY, 1775

The now well-known exhortation "Give me liberty, or give me death!" comes from a speech delivered by Patrick Henry, one of the Founders of the United States, on March 23, 1775. Henry's impassioned address galvanized support for the cause of independence against British rule.

The question before the House is one of awful moment to this country. For my own part I consider it as nothing less than a question of freedom or slavery; and in proportion to the magnitude of the subject ought to be the freedom of the debate. . . .

They tell us, sir, that we are weak; unable to cope with so formidable an adversary. But when shall we be stronger? Will it be the next week, or the next year? Will it be when we are totally disarmed, and when a British guard shall be stationed in every house? Shall we gather strength by irresolution and inaction? Shall we acquire the means of effectual resistance by lying supinely on our backs, and hugging the delusive phantom of hope, until our enemies shall have bound us hand and foot? Sir, we are not weak, if we make a proper use of the means which the God of nature hath placed in our power. Three millions of people, armed in the holy cause of liberty, and in such a country as that which we possess, are invincible by any force which our enemy can send against us. Besides, sir, we shall not fight our battles alone. There is a just God who presides over the destinies of nations; and who will raise up friends to fight our battles for us. The battle, sir, is not to the strong alone; it is to the vigilant, the active, the brave. Besides, sir, we have no election. If we were base enough to desire it, it is now too late to retire from the contest. There is no retreat but in submission and slavery! Our chains are forged! Their clanking may be heard on the plains of Boston! The war is inevitable—and let it come! I repeat it, sir, let it come!

It is in vain, sir, to extenuate the matter. Gentlemen may cry peace, peace—but there is no peace. The war is actually begun! The next gale that sweeps from the North will bring to our ears the clash of resounding arms! Our brethren are already in the field! Why stand we here idle? What is it that gentlemen wish? What would they have? Is life so dear, or peace so sweet, as to be purchased at the price of chains and slavery? Forbid it, Almighty God! I know not what course others may take; but as for me, give me liberty, or give me death!

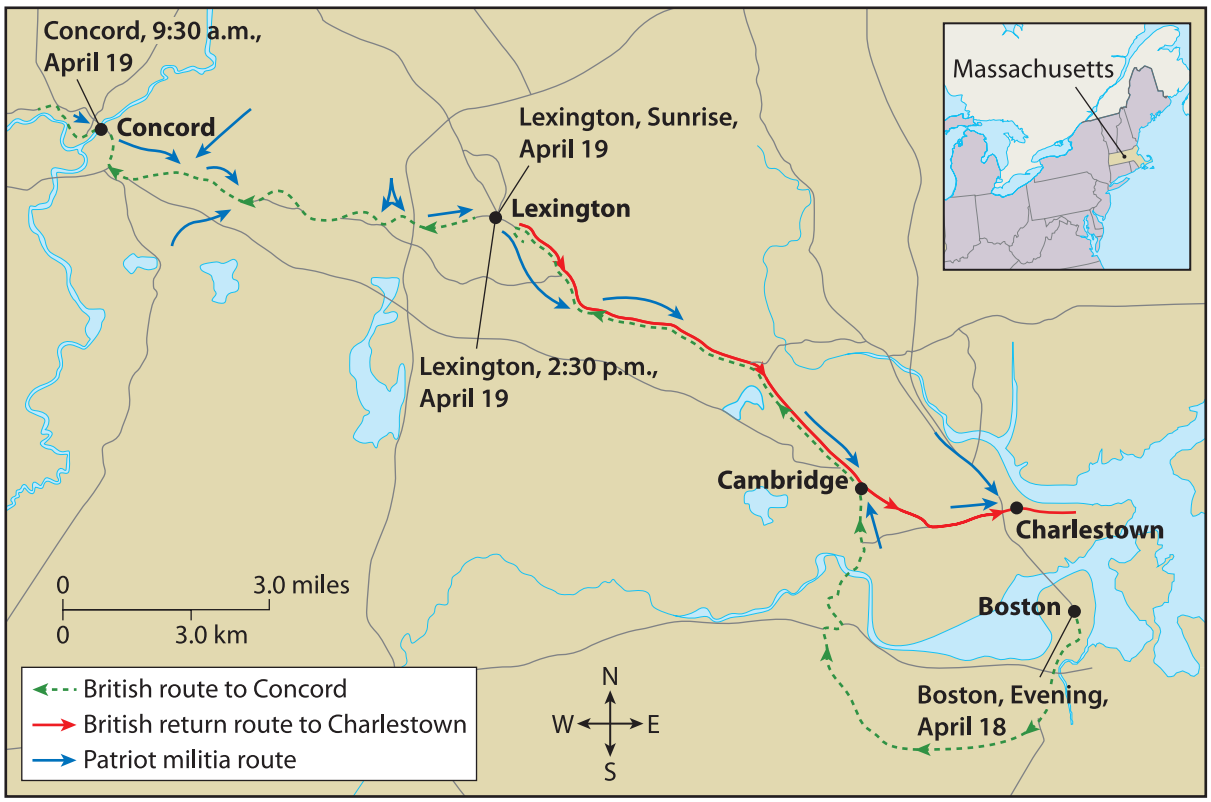
Source: Henry, Patrick. "Give Me Liberty, or Give Me Death!" In *I Am Not a Virginian but an American.* Americanization Department, Veterans of Foreign Wars of the United States, 1926, pp. 5–8.

a militia already gathered in Lexington. They ordered the militia to disperse, but someone—to this day, no one knows who—fired a shot before the order could be followed. Because of its historic implications, that first gunshot came to be called "the shot heard round the world."

A brief skirmish ensued, and eight colonial militia members were killed. At the time, the British considered the Lexington incident minor, and the British commander soon continued the march toward Concord. However, today, the Battle of Lexington on April 19, 1775, is considered the start of the American Revolution.

By the time the British reached Concord a few hours later, word of the fighting at Lexington had traveled throughout the Massachusetts countryside. The British troops were unsuccessful in locating and destroying many of the weapons they had come for, and when they tried to advance toward a nearby farm where munitions were stored, they found some four hundred militia members waiting for them at North Bridge. The ensuing battle lasted nearly

The Battles of Lexington and Concord, April 18–19, 1775



The first military clashes of the American Revolution occurred on April 19, 1775, as British troops marched from Boston to seize weapons in Concord. Confrontations with colonial militias at Lexington and Concord forced a retreat to Charlestown, during which the British faced continuous attacks from Patriot forces along the route.

the entire day along the stretch of road between Concord and Boston, as thousands of militia members from surrounding towns continued to join the fight. Outmatched, the British were forced to retreat from Concord before noon. For the rest of the day, as militia squads launched repeated attacks and sharpshooters fired from hiding places in the forests, the British desperately tried to march back to their base at Charlestown, across the river from Boston. There, the militia held the British Army under siege for nearly a year, preventing it from leaving the area by land.

Think Twice

How did the events of 1774 and 1775 change the goals of the American colonists and their leaders?

The Olive Branch Petition

Even after the Battles of Lexington and Concord, it was still not clear that a full-scale war would take place. The next month, in May 1775, delegates from all thirteen colonies convened in Philadelphia for the Second Continental Congress. They debated how to respond to the outbreak of hostilities. In July, they drafted and signed a petition that signaled their final hope of avoiding all-out war. Known as the Olive Branch Petition, after the traditional symbol of peace, it asked King George III to dissuade his ministers and governors from any further hostilities. The king, however, rejected the petition without reading it, declared the colonists in a state of rebellion, and ordered troops to put it down.

Even as the Olive Branch Petition was being written and delivered, fighting around Boston continued. In June 1775, British forces captured the Charlestown peninsula in the Battle of Bunker Hill, thus robbing the colonists of an important vantage point over Boston Harbor. Although the British won the battle, they had once again been unprepared for the fierce resistance put up by the colonial militias, which killed about 230 of the 3,000 redcoats and wounded more than 800. Soon after the Battle of Bunker Hill, the Continental Congress stepped up preparations for all-out war by organizing the Continental Army under the leadership of General George Washington. A Virginian who served in the House of Burgesses, Washington had led British forces in the French and Indian War. Despite his experience, he faced a formidable task.

Meanwhile, the siege of Boston continued to prevent British troops from leaving the city. British forces could neither quell rebellion throughout Massachusetts nor retake captured forts in New Hampshire and Canada. In March 1776, the British decided to abandon Boston and move their home base to Nova Scotia.

Think Twice

What motivated the Second Continental Congress to initially offer the Olive Branch Petition to King George III and Parliament?

PRIMARY SOURCE: THE OLIVE BRANCH PETITION, 1775

On July 5, 1775, the Continental Congress adopted the Olive Branch Petition, which was written by John Dickinson. This appeal to King George III asks for his reconsideration of British policy and a peaceful resolution to colonists' discontent.

Your Majesty's Ministers, persevering in their measures, and proceeding to open hostilities for enforcing them, have compelled us to arm in our own defence, and have engaged us in a controversy so peculiarly abhorrent to the affections of your still faithful colonists, that when we consider whom we must oppose in this contest, and if it continues, what may be the consequences, our own particular misfortunes are accounted by us only as parts of our distress. . . .

Attached to your Majesty's person, family, and government, with all devotion that principle and affection can inspire, connected with Great Britain by the strongest ties that can unite societies, and deploring [regretting] every event that tends in any degree to weaken them, we solemnly assure your Majesty, that we not only most ardently desire the former harmony between her [Britain] and these colonies may be restored, but that a concord [agreement] may be established between them upon so firm a basis as to perpetuate its blessings, uninterrupted by any future dissentions, to succeeding generations in both countries, and to transmit your Majesty's Name to posterity [descendants or future generations]. . . .

That your Majesty may enjoy a long and prosperous reign, and that your descendants may govern your dominions with honor to themselves and happiness to their subjects, is our sincere and fervent prayer.

Source: United States, Continental Congress. *Journals of the Continental Congress, 1774–1789*. Edited by Worthington Chauncey Ford. Vol. 2, *1775: May 10–September 20*. Washington, D.C.: Government Printing Office, 1905, pp. 159–161.

The Declaration of Independence

By the beginning of 1776, sentiment among the colonists was shifting. Many now doubted that the king and Parliament would ever recognize their rights as British subjects. Yet the alternative—establishing an independent republic—was still not widely seen as realistic. A pamphlet titled *Common Sense*, published in Philadelphia by the recently arrived Englishman Thomas Paine, went a long way in helping change this view. In his anonymous essay, Paine explained why independence was not only preferable but

PRIMARY SOURCE: *COMMON SENSE*, THOMAS PAINE, 1776

In Common Sense*, Paine challenges the authority of the British government and the royal monarchy. The pamphlet was a response to the events of April 1775 at Lexington and Concord, which marked the beginning of the war for independence against the British.*

In the following pages I offer nothing more than simple facts, plain arguments, and common sense. . . .

I have heard it asserted by some, that as America hath flourished under her former connexion with Great-Britain, that the same connexion is necessary towards her future happiness, and will always have the same effect. . . . I answer . . . that America would have flourished as much, and probably much more, had no European power had any thing to do with her. The commerce by which she hath enriched herself are the necessaries of life, and will always have a market while eating is the custom of Europe.

But she [Britain] has protected us, say some. . . .

. . . We have boasted the protection of Great-Britain, without considering that her motive was *interest*, not *attachment*. . . .

. . . It is the true interest of America to steer clear of European contentions, which she never can do, while by her dependance on Britain, she is made the make-weight in the scale of British politics.

Europe is too thickly planted with kingdoms to be long at peace, and whenever a war breaks out between England and any foreign power, the trade of America goes to ruin, *because of her connection with Britain*. . . .

. . . No man was a warmer wisher for reconciliation than myself, before the fatal nineteenth of April, 1775*, but the moment the event of that day was made known, I rejected the hardened, sullen tempered Pharaoh of [England] for ever. . . .

. . . Where, say some, is the King of America? I'll tell you, Friend, he reigns above, and doth not make havock of mankind like the Royal [Brute] of Britain. . . . In America THE LAW IS KING. . . .

O ye that love mankind! Ye that dare oppose, not only the tyranny, but the tyrant, stand forth!

**Massacre at Lexington.*

Source: Paine, Thomas. *Common Sense*. Philadelphia: W. and T. Bradford, 1776, pp. 31–58.

PRIMARY SOURCE: DECLARATION OF INDEPENDENCE, 1776

After two days of editing and debate, the Second Continental Congress adopted the Declaration of Independence on July 4, 1776. It proclaims the thirteen American colonies' intent to break free from British rule and establish an independent nation founded on the principles of liberty, equality, and the inherent rights of all individuals.

Future U.S. president Thomas Jefferson (right) was assigned to write the initial draft of the Declaration of Independence. Fellow future president John Adams (center) and Benjamin Franklin (left) assisted.

The unanimous Declaration of the thirteen united States of America.

When in the Course of human events, it becomes necessary for one people to dissolve the political bands which have connected them with another, and to assume among the powers of the earth, the separate and equal station to which the Laws of Nature and of Nature's God entitle them, a decent respect to the opinions of mankind requires that they should declare the causes which impel them to the separation.

We hold these truths to be self-evident, that all men are created equal, that they are endowed by their Creator with certain unalienable Rights, that among these are Life, Liberty and the pursuit of Happiness.—That to secure these rights, Governments are instituted among Men, deriving their just powers from the consent of the governed,—That whenever any Form of Government becomes destructive of these ends, it is the Right of the People to alter or to abolish it, and to institute new Government, laying its foundation on such principles and organizing its powers in such form, as to them shall seem most likely to effect their Safety and Happiness. . . . The history of the present King of Great Britain is a history of repeated injuries and usurpations, all having in direct object the establishment of an absolute Tyranny over these States. To prove this, let Facts be submitted to a candid world. . . .

He has refused to pass . . . Laws for the accommodation of large districts of people, unless those people would relinquish the right of Representation in the Legislature, a right inestimable to them and formidable to tyrants only. . . .

He has erected a multitude of New Offices, and sent hither swarms of Officers to harrass our people, and eat out their substance.

He has kept among us, in times of peace, Standing Armies without the Consent of our legislatures. . . .

He has combined with others to subject us to a jurisdiction foreign to our constitution, and unacknowledged by our laws; giving his Assent to their Acts of pretended Legislation:

For Quartering large bodies of armed troops among us:

For protecting them, by a mock Trial, from punishment for any Murders which they should commit on the Inhabitants of these States:

For cutting off our Trade with all parts of the world:

For imposing Taxes on us without our Consent. . . .

In every stage of these Oppressions We have Petitioned for Redress in the most humble terms: Our repeated Petitions have been answered only by repeated injury. A Prince, whose character is thus marked by every act which may define a Tyrant, is unfit to be the ruler of a free people.

Source: "Declaration of Independence: A Transcription." America's Founding Documents. National Archives. https://www.archives.gov/founding-docs/declaration-transcript.

necessary if the American colonists were to live freely. He argued that the people of the colonies should band together and establish a military that would rival Britain's and protect this new American independence. Paine also outlined a basic plan of government by elected representatives for the new American nation he imagined. Widely read and quoted, *Common Sense* spurred many colonists to take seriously the cause of independence and to believe in the colonies' ability to achieve it.

Within months of the pamphlet's appearance and circulation, the Second Continental Congress was seriously debating the proposals Paine had popularized. On June 7, 1776, the Virginia delegate Richard Henry Lee called on the Congress to declare the thirteen colonies an independent country. Almost immediately, a team that included Thomas Jefferson got to work on the formal language of the declaration. The Lee Resolution passed on July 2, and two days later, on July 4, 1776, the Second Continental Congress voted to approve the Declaration of Independence under the former colonies' new name: the "united States of America."

The Declaration of Independence laid out for a worldwide audience the reasons for rebelling against British rule. Its authors pointed out the many ways King George III and his officials had mistreated the colonists and deprived them of basic rights. Taxation without representation made its way onto the list of grievances, as did the forced quartering of soldiers. To justify the colonists' decision to rebel against their government, Jefferson explained that governments obtained their power "from the consent of the governed," meaning that people could not be ruled against their will by leaders who did not represent them.

One noteworthy feature of the Declaration of Independence was its insistence on certain **inalienable** rights. *Inalienable* means that they cannot be lost, given up, or taken away. These are rights, such as the rights to "Life, Liberty and the pursuit of Happiness," that we have simply because we are human beings. For Jefferson, respecting and protecting these rights was the supreme duty of the government.

The idea of inalienable rights had its roots in the work of the political philosopher John Locke (1632–1704), whose own 1689 book on government identified "Life, Liberty and Estate [property]" as the basic rights of people in society. The declaration of these rights as the basis for a real-world government was a milestone in the history of government.

Of course, declaring that certain rights were inalienable did not mean everyone automatically enjoyed those rights in practice. Moreover, the authors of the Declaration of Independence had a somewhat narrow view of who was entitled to these rights. At the time the Declaration of Independence was penned, slavery was still practiced in the American colonies; it would not be abolished for almost a century. Women's rights, too, lagged far behind those of men, as the future First Lady Abigail Adams (1744–1818) reminded her husband, John Adams, when they discussed the Continental Congress. It would require centuries of work to move the American republic toward a recognition of equal rights for all.

Think Twice

How does the Declaration of Independence both reflect and build upon ideas presented in Thomas Paine's *Common Sense*?

The American Revolution

The American Revolution itself lasted about eight years, from the Battles of Lexington and Concord in April 1775 to the signing of the Treaty of Paris in September 1783. Britain entered the war as the world's wealthiest nation and a major colonial power. It had a large professional army and the most formidable navy in the world at the time, along with the wealth to supply these forces and hire additional soldiers as needed.

At the same time, Britain had incurred serious costs in protecting its North American colonies

from French encroachment and Native American resistance. Furthermore, it had to send any new troops and materials across the ocean, another costly endeavor. Military and trade conflicts over British colonial interests in the Caribbean and South Asia further divided its resources and attention. Lexington, Concord, and Bunker Hill showed the Patriots that they had the advantage in numbers, motivation, and adaptability. These early battles proved that they could win, even if the British were more organized and better armed.

Think Twice

Explain two reasons the British had either an advantage or a disadvantage at the beginning of the American Revolution.

The British Gain, Then Lose, the Advantage

The first major engagement following the Declaration of Independence was the Battle of Long Island on August 27, 1776. The British seized the strategic Port of New York, then held by Washington's army, killing or wounding some two thousand Continental Army troops in the process. Outgunned and overwhelmed by this massive loss, the Continentals retreated to Pennsylvania by the end of November.

Later that year, the luck of the Continental Army improved somewhat. In December, Washington's troops gained a tactical victory

On the night of December 25, 1776, General George Washington led a surprise crossing of the ice-filled Delaware River, an event captured in this celebrated 1851 painting by Emanuel Leutze. The daring maneuver allowed Continental forces to launch a successful attack in Trenton, New Jersey.

Major Battles of the American Revolution

Most of the battles of the American Revolution took place in the Northeast. This was the most densely populated region; it was also the new country's commercial and economic center.

that significantly boosted morale. The British forces in New Jersey were composed of many Hessians—well-trained and experienced **mercenaries** from the German region of Hesse. On Christmas night 1776, Washington led his troops across the icy Delaware River in a surprise attack, capturing most of the 1,400 Hessian troops stationed at Trenton. Another victory for the Continentals followed in January 1777, when Washington ousted a British force from Princeton and ultimately expelled the British Army from New Jersey.

In the latter half of 1777, British officers sought to use their base at New York City to suppress the Patriots in New England quickly and decisively. General William Howe captured Philadelphia—the seat of the Second Continental Congress—in the fall of 1777, but this left the rest of the British Army unsupported as they ventured into upstate New York. In the Battles of Saratoga, on September 19 and October 7, 1777, the British suffered a major defeat by a much larger Continental force.

Think Twice

How did the capture of Philadelphia contribute to the British defeat at Saratoga?

New Allies for the Continentals

The progress of the American Revolution was closely monitored by many European leaders. The Continental victory at Saratoga convinced the French king, Louis XVI, to form an alliance with the Americans. They now seemed poised to win a war against a long-standing enemy of France. French aid in the form of troops, arms, supplies, and money proved critical to the Patriots' effort.

Despite this much-needed help, the winter of 1777–78 proved to be a trying and often deadly time for the Continental Army, which encamped at Valley Forge, Pennsylvania, amid bitter cold. With limited food and supplies, many soldiers died from disease, exposure, and starvation during this pause in fighting.

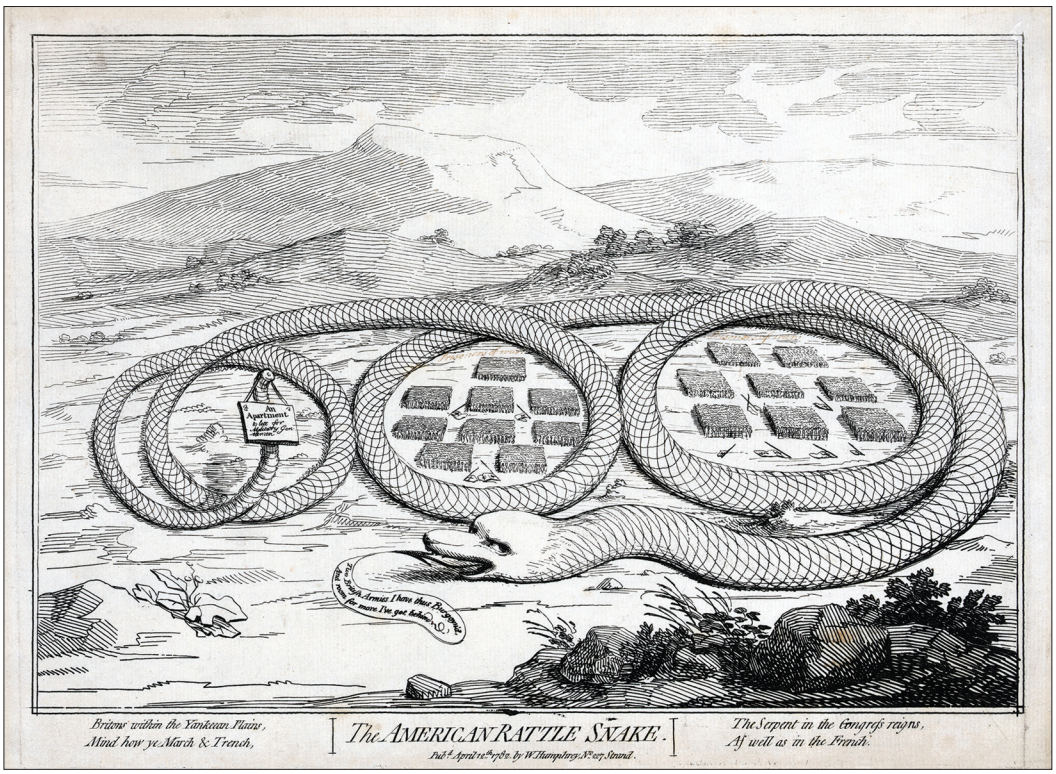
Marquis de Lafayette, for whom the Louisiana parish and city are named, traveled from France to join the American cause. He served under George Washington and later became a Continental commander himself.

Washington's letters from this time make for grim reading, telling of an army that would have to "starve—dissolve—or disperse" unless things soon changed for the better.

The Final Campaign

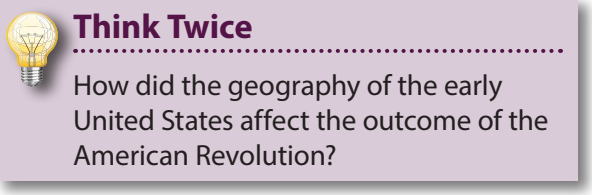
On land, a series of smaller battles proceeded from 1778 to 1780, even as the overall outcome of the war remained unclear. In 1781, a tactical blunder by British general Lord Charles Cornwallis improved the Continental Army's odds. Cornwallis had ventured into the South a year earlier because British leaders believed that many Loyalists lived there. However, they were soon disappointed, and Cornwallis's campaign made minimal progress despite exhausting his troops and supplies. Toward the end of September, he decided to abandon this effort and led his troops to Yorktown, Virginia, on the shore of the York River, where they would await resupply.

Cornwallis chose the wrong location. A joint American and French force quickly surrounded Yorktown and prepared their cannons. At the same time, the French navy blockaded the York River, trapping the British



This 1782 work by British cartoonist James Gillray (1757–1815) laments the Continental Army's victory at Yorktown. The verse at the bottom of the page reads "Britons within the Yankean Plains, / Mind how ye March & Trench, / The Serpent in the Congress reigns, / As well as in the French."

and preventing their rescue. Not only were the British cut off from their supply lines; they were also, to Cornwallis's great surprise, completely outgunned. On October 19, 1781, Cornwallis surrendered in what became the last major battle of the American Revolution.



Think Twice

How did the geography of the early United States affect the outcome of the American Revolution?

Colonists who supported the Patriot cause often ridiculed, threatened, and at times physically abused Loyalists. Some Loyalists were made to "ride the rail," meaning they were carried out of town on a fence rail in a mock parade.

The Treaty of Paris

After the American victory at Yorktown, the British managed to win only a few skirmishes before they were ready to negotiate a truce. With the signing of the Treaty of Paris on September 3, 1783, Britain formally recognized the independence of the United States of America. This was an enormous achievement for former colonies that now, given their gradually increasing wealth, vast size, and growing population, could assume a serious role in international affairs.

The Treaty of Paris formed part of the broader Peace of Paris, in which Britain also signed agreements with France, Spain, and the Netherlands. The agreements set the boundaries of the new United States, as shown in the map on page 24.

Other clauses of the Treaty of Paris dealt with the repayment of debts and the release of prisoners of war. Still others concerned economic matters, such as fishing rights in the Atlantic and guaranteed access to the Mississippi River for both British and American shipping.

The Treaty of Paris only briefly touched on how Loyalists should be handled after the revolution, leaving those who had chosen not to side with the Patriots with difficult choices. Loyalists came from all sorts of backgrounds and had many reasons for opposing the revolution. A significant number of African American Loyalists, for instance, sided with the British because they promised freedom to enslaved people. At the same time, farmers in the westward reaches of the colonies assumed they were not a group of interest to Patriot leaders and therefore did not lend them their support. Once the war ended, many Loyalists, fearful of further retaliation, fled to England or other regions still under

North America Following the Peace of Paris, 1783

The borders of much of North America were redrawn by the Peace of Paris. A large part of the vast territory claimed by Spain would return to France in 1800 and then become part of the United States via the Louisiana Purchase of 1803.

British control. However, most Loyalists simply remained in the United States, adapting to the new political environment as best they could.

Think Twice

Explain two reasons the Mississippi River was so significant in the Treaty of Paris.

Government of the New United States

Even as the war was ongoing, the revolutionaries recognized the need for a new government. Colonial leaders such as Thomas Jefferson were familiar with the work of the Baron de Montesquieu (/mahn*teh*skyu/; 1689–1755), a French legal theorist who identified three distinct functions of government: making laws, enforcing laws, and interpreting laws. Montesquieu argued that these three functions should be divided among three separate branches of government: legislative, executive, and judicial. This **separation of powers**, Montesquieu said, would prevent any one person or group from gaining total control of the government.

Another important principle advocated by Montesquieu was that of **checks and balances**. This was the idea that different branches, or parts, of a government should have the ability to review and challenge each other's actions.

The Articles of Confederation

In addition to creating the Declaration of Independence, the Second Continental Congress drafted the basic framework by which the new United States would be governed: the Articles of Confederation. The Declaration of Independence stated that the United States was a new country; the Articles of Confederation spelled out how it would operate.

The Articles of Confederation described each state as having its own "**sovereignty**, freedom and independence" in most matters. Officially, the central government created by the Articles had several of the powers that we expect of a modern national government. It could declare war, form treaties, and conduct **diplomacy** with foreign countries. In practice, however, the central government had some critical weaknesses that limited its power domestically and abroad. It was not authorized, for instance, to raise taxes to support the army it commanded, nor to force states to observe the treaties that it made. States remained independent in economic matters as well.

The Articles of Confederation allotted each state one equal vote in Congress. Virginia, a state with more than 450,000 people in 1790, had the same voting power as Delaware, whose 1790 population was around 50,000.

Overall, the government created by the Articles truly was a **confederation**—a relatively loose affiliation of smaller independent states. Those states, like the colonies that preceded them, had their own legislative assemblies that made decisions on behalf of the state and its people. While well-intentioned, this confederate form of government soon ran into serious problems in the areas of foreign policy, defense, and taxation.

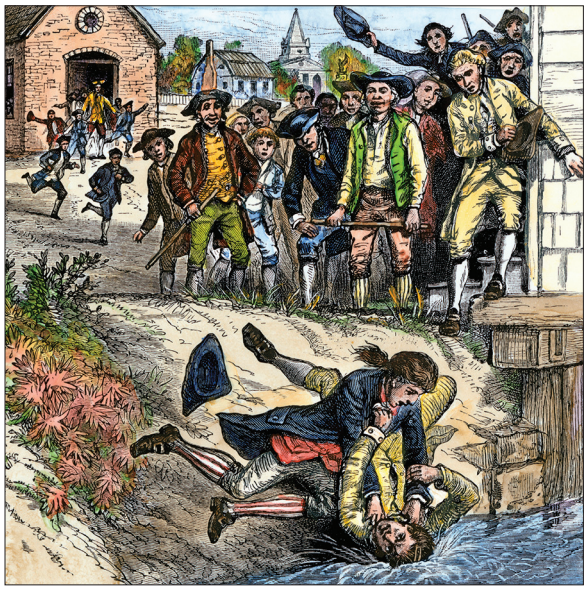
The Confederation Is Tested

Under the Articles of Confederation, the Congress could not impose taxes; it could only request that states make contributions. Thus, the United States struggled almost immediately to pay the soldiers of the Continental Army who had served in the American Revolution. Many of those soldiers, in turn, had trouble paying their debts. In June 1783, a group of these veterans appeared before Congress at the Philadelphia State House to present a formal demand for their unpaid wages. When this was ignored, a larger number of soldiers marched on the State House

The Northwest Ordinance

The Northwest Ordinance of 1787 was a law passed by the Confederation Congress to organize the Northwest Territory, land north of the Ohio River and east of the Mississippi River. It established a system for creating new states and outlined the steps territories had to take to become part of the United States. The ordinance guaranteed key rights like freedom of religion, trial by jury, and public education, and it banned slavery in the territory, setting an important precedent for future western expansion. It also required fair treatment of Native Americans, though in practice, many settlers and U.S. policies failed to uphold this. The ordinance helped promote orderly settlement and was one of the most successful actions taken under the Articles of Confederation. Eventually, five states—Ohio, Indiana, Illinois, Michigan, and Wisconsin—were created from the Northwest Territory. The Northwest Ordinance laid the foundation for how the United States would expand and admit new states going forward.

to protest in what is now known as the Philadelphia **Mutiny**. A later rebellion took place in Massachusetts in 1786, when unpaid veterans found that they could not pay back debts incurred from operating their farms.



Shays's Rebellion began as a peaceful protest in western Massachusetts in the summer of 1786, but eventually fighting broke out.

Shays's Rebellion, as it came to be called, turned deadly in January 1787 when rebels and state militia members engaged each other in a skirmish.

These two acts of rebellion, the first of which took place before the American Revolution had even ended, revealed serious weaknesses in the structure of the newly declared U.S. government. Congress could not enforce its laws, raise revenue, or maintain an army without the continued cooperation of individual states. Absent that cooperation, the country simply could not function in a unified way.

Think Twice

How did the Philadelphia Mutiny and Shays's Rebellion expose weaknesses in the Articles of Confederation?

The U.S. Constitution

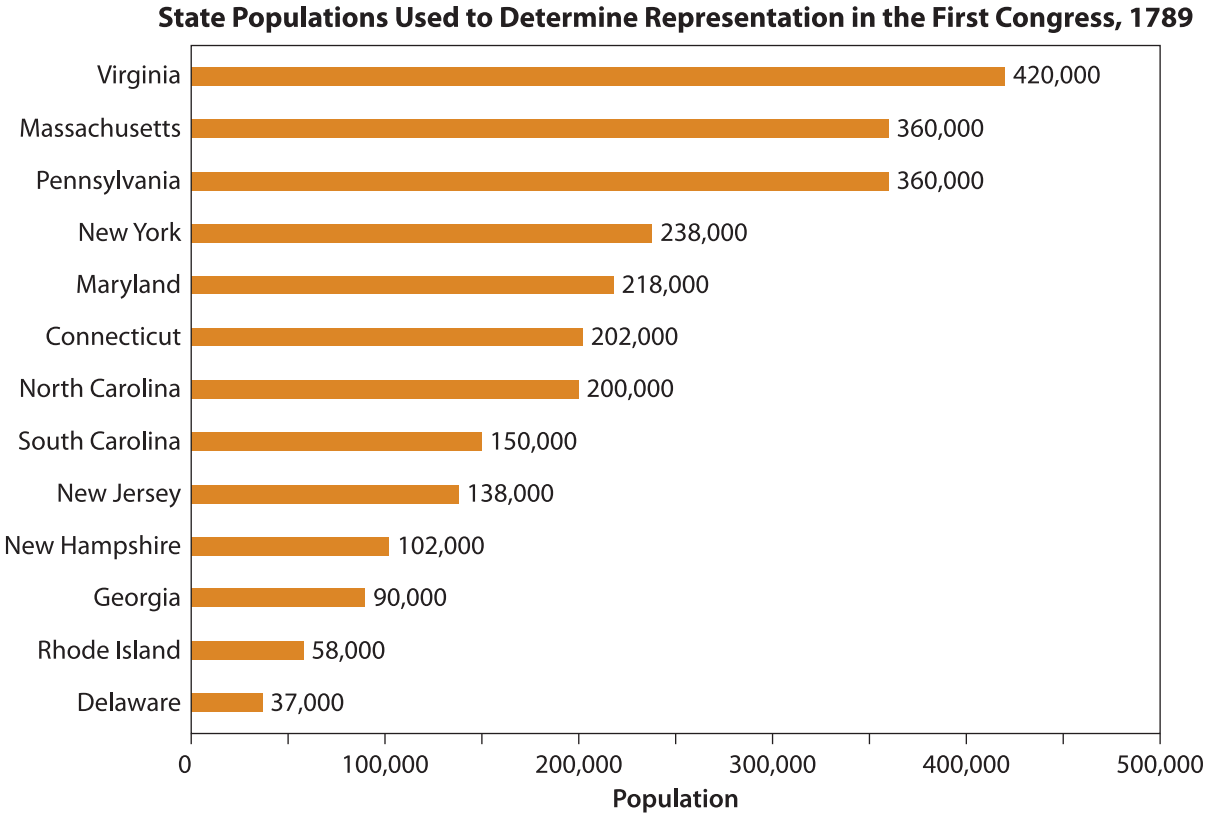
In May 1787, delegates met in Philadelphia and planned to revise the Articles of Confederation to enhance the central government's powers. However, most delegates quickly decided that mere revision would not be sufficient. Ultimately, the group drafted a document that would entirely replace the Articles of Confederation and create a new U.S. constitution. Their meeting, which took place over three months, came to be called the Constitutional Convention.

Constitutional Compromises

The attendees of the Constitutional Convention had to resolve several disagreements between the fledgling states. Everyone agreed that the new government should be a **republic**, but there was disagreement concerning how representation in the legislative body, or Congress, would be determined. Delegates from larger, more populous states, such as James Madison of Virginia, wanted representation to be proportional to population. This was known as the Virginia Plan. Small-state advocates, led by William Paterson of New Jersey, called for equal representation by state.

Smaller and larger states also differed on how many houses Congress should have: Virginia and its allies wanted a bicameral, or two-chamber, legislature, while advocates of the New Jersey Plan wanted a unicameral, or single-chamber, legislature. Large states, because their populations and economies granted them more influence, were more willing to endorse a strong federal government that could overrule state legislation. Those in smaller states feared that a too-powerful Congress might serve the interests of larger states only. They advocated for states to be largely independent in making laws.

Some of the most contentious issues were settled when the two groups reached what is known as the Great Compromise or Connecticut Compromise, named for the role that Connecticut's delegates played in brokering it. Under this compromise, Congress would have two houses: a Senate with equal representation by state and a House of Representatives with seats assigned based on population. The eventual U.S. Constitution would also make it clear that federal laws (and the Constitution itself) would prevail over state laws and constitutions whenever there was a conflict between them. This part of the Constitution is called the supremacy clause, and it remains a cornerstone of the federal–state relationship. The nature of **federalism**—the sharing of power between state and federal



The thirteen states varied greatly in population. Note that Virginia is the most populous state and New Jersey is among the least populous, in keeping with their proposals for representation. Connecticut, whose delegates brokered the compromise, is in the middle.

governments—has been a recurring topic of debate since the nation's founding.

Another crucial disagreement concerned whether **apportionment** would be based on a count of all persons or only a count of free persons—that is, whether enslaved persons were to be counted as people. States with large populations of enslaved persons wanted all residents of the state counted. States less dependent on slavery wanted to exclude enslaved persons and count only free persons. The Constitutional Convention settled on the Three-Fifths Compromise: A state's population "shall be determined by adding to the whole Number of free Persons . . . three fifths of all other Persons." When slavery was outlawed after the Civil War, this compromise ceased to have any effect.

By mid-July 1787, compromises had been reached on each of these divisive issues. On July 26, a special committee of delegates—the Committee of Detail—began drawing up the first recognizable draft of the U.S. Constitution we have today. They set about delineating the functions and powers of each branch of government, revising and adding throughout August and early September.

A separate committee then edited the Constitution before returning it to the Constitutional Convention to sign.

Think Twice

Explain two ways the Constitutional Convention was characterized by conflict and compromise.

Key Ideas of the U.S. Constitution

The U.S. Constitution **codified**, or formally standardized, many of the ideas advanced in the Declaration of Independence. It established protections for the natural rights to life and liberty by outlawing various abusive practices, such as denying people a fair trial. It gave the elected legislature priority in governing and laid out election procedures that would ensure representative democracy, tying political power to **popular sovereignty**, or the right of people to self-government.

The Constitution itself is a remarkably concise text given its weighty task. The Framers, or authors, began with a preamble explaining their reasons for forming a constitutional government: "We the People of the United States, in Order to form a more perfect Union, establish Justice, insure domestic Tranquility, provide for the common defence, promote the general Welfare, and secure the Blessings of Liberty to ourselves and our Posterity, do ordain and establish this Constitution for the United States of America."

From there, the main body of the Constitution begins by devoting one article to each branch of government. Article I describes the structure of the two houses of Congress, the requirements for serving in either, and the general rules for elections as well as the several powers of Congress.

Articles II and III spell out the powers of the executive and judicial branches and important limits on those powers. For example, Article II tells how the president and vice president are elected and the length of their terms. Article III guarantees a trial by jury in criminal cases and provides a clear and narrow definition of **treason**.

Article IV describes the process for creating new states and the relationship between individual states. Article V describes the process for amending, or changing, the Constitution, in which both Congress and the state legislatures play a role. If a two-thirds majority in both houses of Congress approve a proposed amendment, it goes to the states for **ratification**. Ratification by each state is achieved by either a majority vote in both houses of the state legislature or a specially organized state ratifying convention. Three-quarters of the states must ratify the amendment for it to become part of the Constitution.

The final two articles are very succinct but no less important. Article VI contains the all-important supremacy clause and

firmly tells public officials to support the Constitution. The last article, Article VII, explains how the Constitution was to be ratified by the individual states. When this process was finally carried out, it brought its own complications and controversies.

Think Twice

Explain two ways that the Founders tried to prevent an overly powerful government when drafting the U.S. Constitution.

The Ratification Debate and the Bill of Rights

Some important disagreements needed to be resolved before the states would ratify the Constitution. The Constitutional Convention delegates signed the Constitution on September 17, 1787, and its contents became public soon after. When they saw what the Constitution included and excluded, many people felt it omitted important provisions. In particular, the Constitution lacked a formal list of individual rights that the government would be required to respect.

Those who opposed ratification of this version of the Constitution were dubbed Anti-Federalists. A number of published articles and pamphlets warned against a too-strong central government. Patrick Henry, of "Give me liberty, or give me death" fame, was among them.

Those who favored ratifying the proposed Constitution were known as Federalists, from their belief in a strong federal government. Major Federalist leaders included Alexander Hamilton, James Madison, and John Jay, the authors of the Federalist papers. These essays, published between October 1787 and May 1788, explained the purpose and benefits of various aspects of the proposed Constitution and urged speedy ratification.

Federalists succeeded in convincing the various state legislatures to ratify the Constitution as written rather than waiting for further changes to be made. The ninth state to ratify, making up the needed two-thirds majority, was New Hampshire, on June 21, 1788. The remaining states followed over the next two years, with Rhode Island becoming the last to ratify on May 29, 1790.

The Anti-Federalists, however, had succeeded in raising important concerns about excess federal power. Thanks to their efforts, ten amendments were proposed and ratified almost immediately. Known as the Bill of Rights, these further clarified the roles of federal and state government and enumerated several important rights of individuals, including the rights to a free press (First Amendment) and a speedy trial by jury (Sixth Amendment). The amendments showed that the government, and not just individual people, was subject to the rule of law. In other words, the government had to follow its own laws clearly and consistently.

Many of the rights considered characteristic of life in the United States and in modern

democracies generally can be found in the Bill of Rights, including freedom of speech, freedom of religion, and freedom to assemble peacefully—all of which are found within the First Amendment. By identifying specific government powers, along with individual freedoms the government may not encroach upon, the Bill of Rights affirmed the principle of limited government and went some way toward assuaging Anti-Federalist fears.

Think Twice

What lasting contribution did the Anti-Federalists make to the U.S. government?

The First President: George Washington

The first U.S. president elected under the Constitution was George Washington, whose status as a war hero and a leader of the Constitutional Convention made him a popular choice. Washington faced several challenges during his first term in 1789–93. He and Congress, the country's new legislature under the Constitution, had to build the federal government essentially

PROCESSION IN HONOR OF THE FEDERAL CONSTITUTION.

Despite disagreements over ratification, the passage of the Constitution was widely celebrated. Here, revelers in Alexander Hamilton's adopted hometown of New York honor him with a "ship of state" parade float.

George Washington

from scratch. Congress created the State Department to handle international affairs, the War Department to handle national defense, and the Treasury Department to handle the nation's finances. As head of the executive branch, Washington appointed skilled leaders to head these departments. He also appointed an attorney general to handle the country's legal business. Washington met with these four leaders to get their advice as a group, creating the first cabinet.

A major difficulty that the new government immediately faced was the huge debt from the American Revolution. To pay it, Alexander Hamilton, Washington's secretary of the treasury, proposed a tax on whiskey, which Congress passed in 1791. This tax was extremely unpopular in western Pennsylvania, where grain farmers made a living by distilling their crop into liquor. These farmers, many of them poor, rejected the tax, laying the groundwork for what would become known as the Whiskey Rebellion, about which you will read shortly.

Another challenge was ongoing conflicts with Native American peoples, who controlled British forts in present-day Ohio and Indiana. One such conflict, known as the Northwest Indian War, stemmed from British claims that they had ceded Native lands to the United States. To help pay its war debts, the Washington administration attempted to sell this land to settlers. But Americans who tried to settle there were encroaching on territory long held by Native nations. In doing so, they sparked the very kinds of clashes the British government had hoped to prevent when the king issued the Proclamation of 1763.

A coalition of Native American leaders, including the Miami chief Little Turtle and the Shawnee chief Blue Jacket, engaged in battle with American soldiers sent to subdue Native resistance, killing, wounding, or capturing almost all of the Americans. The

death toll and perceived mishandling of the war undermined confidence in Washington's government and in the strength of the newly formed U.S. Army.

Think Twice

How did the events of Washington's first term test the structure and powers of the government laid out under the U.S. Constitution?

Washington's Second Term, 1793–97

Washington nearly declined to run for a second term but was persuaded by allies, including Thomas Jefferson, to serve another four years. Despite his generals' missteps in the Northwest Indian War, Washington himself remained quite popular and won reelection unanimously. He had largely avoided aligning with political parties and deferred to Congress's authority in legislative matters. For these reasons, Washington seldom vetoed legislation, treating this as an option to be exercised only in extreme cases. His second term saw the conclusion of the two major conflicts that Washington had faced during his first four years in office: the Whiskey Rebellion and the Northwest Indian War.

In 1794, the Whiskey Rebellion grew violent, forcing a confrontation between the rebel farmers and several state militias under federal command. Washington personally led the expeditionary force to western Pennsylvania and succeeded in dispersing the rebels. A group of 150 men were captured and tried for treason, of whom only two were found guilty; both received presidential pardons. The decisive response to the Whiskey Rebellion showed

Tax collectors during the Whiskey Rebellion faced many of the same hazards as tax collectors before the American Revolution. In this street scene, a tax official has been tarred and feathered and is being run out of town on a rail. The power of the federal government as outlined in the country's new constitution ended the uprising fairly quickly.

that the federal government under the Constitution was considerably more powerful than its predecessor under the Articles of Confederation had been.

The year 1794 was also a decisive year for the Northwest Indian War. General Arthur St. Clair had been dismissed from his post and succeeded by Anthony Wayne, who led

PRIMARY SOURCE: FAREWELL ADDRESS, GEORGE WASHINGTON, 1796

Friends and Fellow-Citizens:

The period for a new election of a citizen to administer the executive government of the United States being not far distant, . . . it appears to me proper, especially as it may conduce to a more distinct expression of the public voice, that I should now apprise you of the resolution I have formed, to decline being considered among the number of those out of whom a choice is to be made. . . .

Here, perhaps, I ought to stop. But a solicitude for your welfare . . . urge[s] me . . . to recommend to your frequent review, some sentiments which are the result of much reflection, of no inconsiderable observation, and which appear to me all important to the permanency of your felicity as a people. . . .

The alternate domination of one faction over another, sharpened by the spirit of revenge natural to party dissension, which in different ages and countries has perpetrated the most horrid enormities, is itself a frightful despotism. But this leads at length to a more formal and permanent despotism. The disorders and miseries which result gradually incline the minds of men to seek security and repose in the absolute power of an individual; and sooner or later the chief of some prevailing faction, more able or more fortunate than his competitors, turns this disposition to the purposes of his own elevation on the ruins of public liberty. . . .

The great rule of conduct for us in regard to foreign nations is, in extending our commercial relations, to have with them as little *political* connection as possible. So far as we have already formed engagements, let them be fulfilled with perfect good faith. Here let us stop. . . .

Our detached and distant situation invites and enables us to pursue a different course.

Source: Washington, George. *Washington's Farewell Address to the People of the United States*. 1796. S. Pub. No. 115-5 (2017).

a new, better-trained force. Wayne eventually defeated the Northwestern Confederacy in 1794 at the Battle of Fallen Timbers, forcing confederacy leaders to cede tribal lands in the 1795 Treaty of Greenville. This loss of territory caused enormous resentment among the Indigenous peoples of the Northwest and would motivate many to side with the British during later wars in the region.

Finally, Washington's second term brought clarity to the United States' relationships with Great Britain and France. Partly because of British interference in the Northwest Indian War, there remained a threat that war would resume between Great Britain and its former colonies. Meanwhile, France had been undergoing a revolution of its own since 1789, and despite France's support during the American Revolution, Washington had maintained American neutrality in the French Revolution. In 1794, the Jay Treaty, negotiated by Washington's envoy John Jay, affirmed peaceful trade relations with Britain, which upset the French. Controversy over this treaty accelerated the rise of **partisan** politics in the United States. The Federalists supported it, while their opponents, the Democratic-Republicans, opposed it because of the harm they felt it would do to the U.S.–France relationship.

Of the many precedents that Washington set as the first president, one of the most important was his refusal to seek a third term in office. The two-term tradition remained in place informally until the 1940s, and the Twenty-Second Amendment, ratified in 1951, made a presidential two-term limit part of the Constitution.

In September 1796, with the election of his successor approaching, Washington wrote a farewell address to the country, which was printed in newspapers throughout the country. He expressed his gratitude to those who had elected him and those who had served alongside him. He also warned his fellow Americans about what he saw as the main dangers to the young republic: party politics, regional divisions, and excessive foreign entanglements. Washington's advice on foreign policy would be cited by many leaders over the next century as the United States became increasingly embroiled in world politics.

Think Twice

In what ways was Washington's second term a continuation of his first? What new problems did he face as president?

The Adams Presidency, 1797–1801

When George Washington first took office, there was no political party system like the one in the present-day United States. During his eight years in office, however, distinct factions emerged in American public life and became political parties. John Adams,

This cartoon, titled "Property Protected a la Françoise," satirizes the XYZ Affair. The woman with the feather headdress is Columbia, who represents the United States. The cartoon shows a group of Frenchmen robbing her. As they fill a sack with bribes, representatives of other countries, including Britain, look on and laugh.

formerly Washington's vice president, won the presidency as a member of the Federalist Party, which favored a strong national government, prioritized military strength, and sought friendly relations with Great Britain.

The defining problem of the Adams presidency was American relations with France. Since the early 1790s, France had been at war with Britain, and it saw Washington's policy of noninvolvement as effectively a pro-British policy. At the beginning of Adams's tenure, U.S. diplomats went to Paris to try to prevent war with France. But the French ministers' demand for bribes led the Americans to walk away without reaching an agreement. In internal U.S. government correspondence, the ministers' names were disguised as *X*, *Y*, and *Z*, and the failed negotiation came to be called the XYZ Affair.

Americans' frustration with the XYZ Affair only heightened tensions between the two countries, and fighting broke out between the French and American navies in 1798 and continued until 1800. Because war was not officially declared, this episode is known as the Quasi-War. Despite its unofficial status, the conflict provided Adams and the Federalists with a pretext to build up the American military, though the taxes they imposed to do so

PRIMARY SOURCE: ALIEN AND SEDITION ACTS, 1798

The Sedition Act of 1798 was part of a series of measures ostensibly addressing the threats involved in the Quasi-War with France. Critics viewed the act as a thinly disguised partisan effort to control political debate until the next presidential election. The clash over the Sedition Act yielded the first sustained debate over the meaning of the First Amendment. Three of the four Alien and Sedition Acts expired not long after the beginning of the nineteenth century.

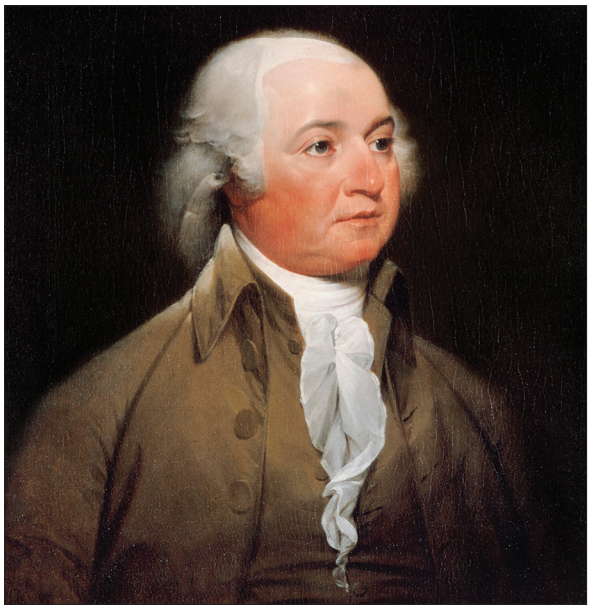
An ACT concerning aliens.

. . . It shall be lawful for the President of the United States at any time during the continuance of this act, to order all such aliens as he shall judge dangerous to the peace and safety of the United States, or shall have reasonable grounds to suspect are concerned in any treasonable or secret machinations against the government thereof, to depart out of the territory of the United States. . . . And in case any alien, so ordered to depart, shall be found at large within the United States after the time limited in such order for his departure, and not having obtained a license from the President to reside therein, or having obtained such license shall not have conformed thereto, every such alien shall, on conviction thereof, be imprisoned for a term not exceeding three years, and shall never after be admitted to become a citizen of the United States. . . .

An ACT in addition to the act, entitled An Act for the punishment of certain crimes against the United States.

. . . And be it further enacted, That if any person shall write, print, utter or publish, or shall cause or procure to be written, printed, uttered or published, or shall knowingly and willingly assist or aid in writing, printing, uttering or publishing any false, scandalous and malicious writing or writings against the government of the United States, or either house of the Congress of the United States, or the President of the United States, with intent to defame the said government, or either house of the said Congress, or the said President, or to bring them, or either of them, into contempt or disrepute; or to excite against them, or either or any of them, the hatred of the good people of the United States, or to stir up sedition within the United States, or to excite any unlawful combinations therein, for opposing or resisting any law of the United States, or any act of the President of the United States, done in pursuance of any such law, or of the powers in him vested by the constitution of the United States, or to resist, oppose, or defeat any such law or act, or to aid, encourage or abet any hostile designs of any foreign nation against United States, their people or government, then such person, being thereof convicted before any court of the United States having jurisdiction thereof, shall be punished by a fine not exceeding two thousand dollars, and by imprisonment not exceeding two years.

Source: "Alien and Sedition Acts (1798)." Milestone Documents. National Archives. https://www.archives.gov/milestone-documents/alien-and-sedition-acts.



John Adams

proved very unpopular. To quell the unrest and respond to the presence of supposed French provocateurs in the United States, Congress passed the Alien and **Sedition** Acts. (In this case, *alien* refers to a foreign-born resident who has not become a U.S. citizen and is still a citizen of another country.) These four laws tightened the requirements for citizenship, gave the president significant power to deport and detain noncitizens, and criminalized certain forms of anti-government speech.

Adams deemed these acts necessary for national security and signed them into law. They were never widely enforced during his term and served more to intimidate than to actually punish opponents of the Federalist government. Even so, the Alien and Sedition Acts proved highly controversial, not least because many Americans saw them as restricting freedom of speech. Outrage over the acts' encroachment on civil rights provided the Democratic-Republicans with a major plank in their campaign against the Federalists in subsequent elections. Decrying the Adams administration and its allies as elitists who opposed personal freedom, the Democratic-Republicans, led by Thomas Jefferson—Adams's vice president and Washington's first secretary of state—and Aaron Burr, triumphed in the 1800 election.

Think Twice

Explain how events during the presidencies of George Washington and John Adams tested the ideals of the Constitution and the Bill of Rights.

A Founding Legacy

More than two centuries later, the ideals present in the United States' founding documents remain relevant—and have inspired the creation of many other modern democracies. The Declaration of Independence emphasizes natural, inalienable rights as the basis of all government and insists that legitimate government rests on the consent of the governed. The Constitution and Bill of Rights reaffirm the principle of popular sovereignty: All legitimate power of government comes from "We the People."

The country's first two presidents demonstrated that a strong federal government could

function to protect people from domestic uprisings and foreign threats without infringing on the authority of the states. Compared to the mutinies of the 1780s, which Congress struggled to address under the Articles of Confederation, the crises of the 1790s were handled far more efficiently. Even so, the United States' first decade of life as a constitutional republic raised questions about states' rights and federal overreach—questions that would continue to be debated by Americans and their courts in the nineteenth century.

The American overthrow of monarchical rule by former colonies was remarkable in its time and paved the way for an Age of Revolution around the world. The French Revolution of 1789 is often viewed as having been directly inspired by its American predecessor. Numerous other revolutions also took place in Europe and the Americas throughout the early nineteenth century. The republics that were thus founded, such as Mexico, often modeled their constitutions partly or wholly on that of the United States. In later years, the founding of the American republic came to be described as a "great experiment" in democratic self-rule. Over the centuries, many Americans and their leaders have pointed to this "experiment" as the result of *American exceptionalism*, or the belief that the United States is an exceptional nation and an inspiration for other countries.

However, Americans are not alone in viewing the United States as a distinctive society with unique political and social characteristics. One early observer of this distinctiveness was Alexis de Tocqueville, whose travels in the United States inspired him to write the book *Democracy in America* (1835). Half a century after the Constitution was ratified, Tocqueville identified four values that he deemed critical to the success of the American experiment: egalitarianism, liberty, populism, and individualism.

Egalitarianism refers to the belief that all people are equal and should be treated as such before the law. Unlike Europe, where people inherited power and status, the United States struck Tocqueville as a more egalitarian society, though he condemned American slavery as a clearly inegalitarian practice. By *liberty*, Tocqueville meant respect for and legal protection of personal civil rights such as freedom of speech and religious freedom. *Populism* for Tocqueville meant respect for the will of the people in decision-making, as illustrated by elections. The representative, democratic nature of American government was for Tocqueville one of its strongest qualities. Tocqueville also considered *individualism*, including self-reliance and the rewarding of individual accomplishments, to be a source of American success.

Some also attribute praise for the *laissez-faire* (/leh*say/fair/) nature of the American political economy to Tocqueville. This French phrase, loosely translatable as "let them do," meant that the government did not intervene heavily in the economy but allowed the

Adam Smith and *The Wealth of Nations*

The concept of laissez-faire economics was, as its name suggests, originally described and promoted by French thinkers. Known as the Physiocrats, these eighteenth-century French political philosophers called for the government to intervene only minimally in the economy and to let individuals and firms make their own decisions. Their works were well-known to Tocqueville and influenced his concept of the values that underlie a successful republic.

In the English-speaking world, laissez-faire principles were popularized by the Scottish philosopher and economist Adam Smith (1723–90). His book *The Wealth of Nations* (1776) presents, in great detail, an argument that the most efficient economy will result if individuals are left to act based on their own self-interest. Smith claimed that without government intervention, individuals would be free to make decisions that, taken together, would provide society with the goods and services people wanted, and at a fair price. Firms that produced too much of a good, Smith said, would have to lower their prices, improve their product, or switch to a more profitable industry. Individuals would, by a similar logic, find profitable employment for their time and talents. Smith famously likened this process to an "invisible hand" moving resources—labor, money, goods—to the uses in which they would be most valuable. In his view, most government intervention naturally made the economy less efficient than the self-organization of a free market.

market to govern itself. This value is likely the one that has undergone the greatest change in subsequent American history. Over the past two hundred years, protection of social welfare has become an ever-larger part of what people expect from their government. To accomplish this goal, the federal government has gradually adopted greater powers to regulate industry (for example, to inspect workplaces for safety) and to redistribute wealth through taxation.

Without a doubt, the more than two hundred years of America's "great experiment" in self-governance has, at times, been imperfect. However, in the generations since the founding of the American republic, the promise of rights and liberties laid out in the Constitution has been extended to more people than ever before. The tent of democracy has steadily widened—through struggle, reform, and civic engagement—to include groups who were once excluded, bringing the nation closer to its founding ideals of equality and justice for all.

Think Twice

How is the United States an exceptional society and economy, and how have the principles of liberty and individualism influenced this exceptionalism?

PRIMARY SOURCE: *AN INQUIRY INTO THE NATURE AND CAUSES OF THE WEALTH OF NATIONS*, ADAM SMITH, 1776

The value of any commodity . . . to the person who possesses it, and who means not to use or consume it himself, but to exchange it for other commodities, is equal to the quantity of labour which it enables him to purchase or command. Labour, therefore, is the real measure of the exchangeable value of all commodities. . . .

The division of labour, however, so far as it can be introduced, occasions, in every art, a proportionable [proportionate] increase of the productive powers of labour. . . .

To take an example, therefore, from a very trifling manufacture; but one in which the division of labour has been very often taken notice of, the trade of the pin-maker; a workman not educated to this business (which the division of labour has rendered a distinct trade), nor acquainted with the use of the machinery employed in it (to the invention of which the same division of labour has probably given occasion), could scarce, perhaps, with his utmost industry, make one pin in a day, and certainly could not make twenty. But in the way in which this business is now carried on, not only the whole work is a peculiar trade, but it is divided into a number of branches, of which the greater part are likewise peculiar trades. One man draws out the wire, another straights it, . . . and the important business of making a pin is, in this manner, divided into about eighteen distinct operations. . . .

I have seen a small manufactory of this kind where ten men only were employed, and where some of them consequently performed two or three distinct operations. But though they were very poor, and therefore but indifferently accommodated with the necessary machinery, they could, when they exerted themselves, make among them . . . upwards of forty-eight thousand pins in a day. Each person, therefore, making a tenth part of forty-eight thousand pins, might be considered as making four thousand eight hundred pins in a day. But if they had all wrought separately and independently, and without any of them having been educated to this peculiar business, they certainly could not each of them have made twenty, perhaps not one pin in a day; that is, certainly, not the two hundred and fortieth, perhaps not the four thousand eight hundredth part of what they are at present capable of performing, in consequence of a proper division and combination of their different operations.

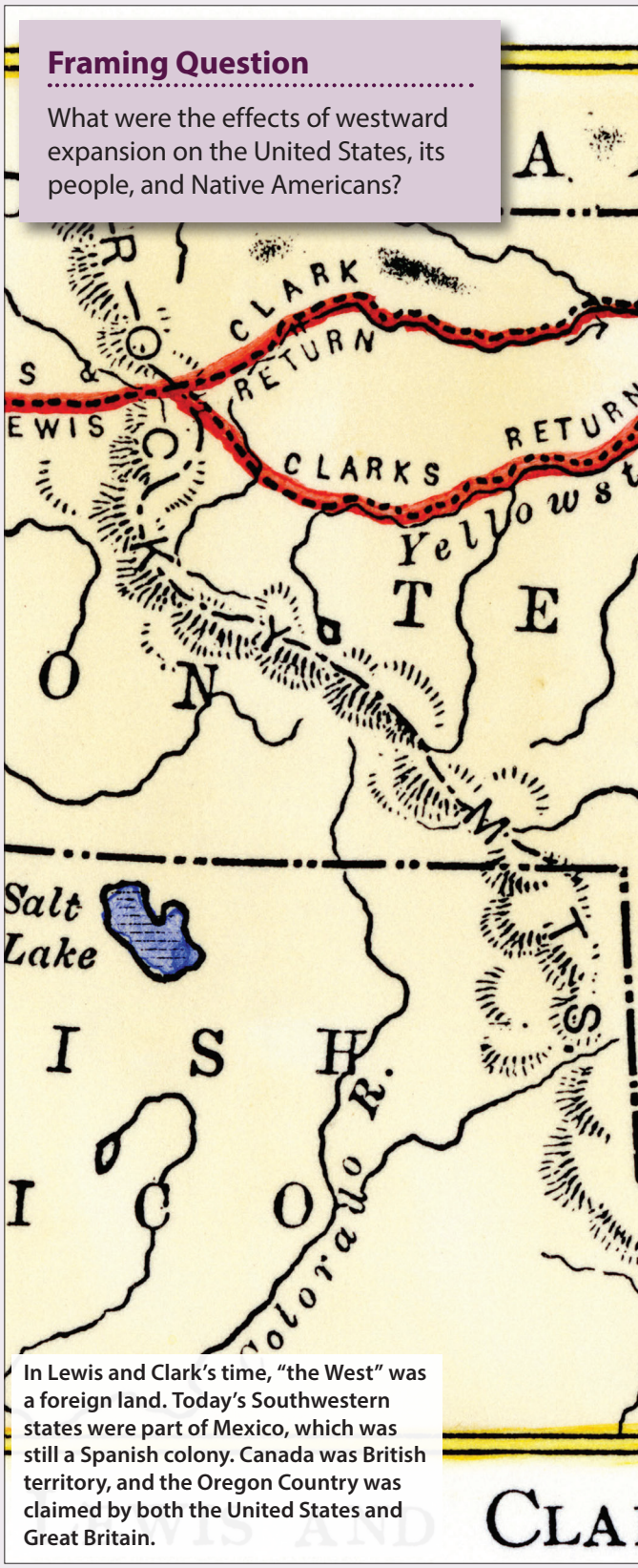
Source: Adapted from Smith, Adam. *An Inquiry into the Nature and Causes of the Wealth of Nations*. Vol. 1. London: T. Cadell and W. Davies, 1805, pp. 46, 10, 8–9.

Topic 2

Western Expansion and the Native American Experience

Framing Question

What were the effects of westward expansion on the United States, its people, and Native Americans?



In Lewis and Clark's time, "the West" was a foreign land. Today's Southwestern states were part of Mexico, which was still a Spanish colony. Canada was British territory, and the Oregon Country was claimed by both the United States and Great Britain.

The Lewis and Clark Expedition

Setting the Scene

"Ocean in view! O! the joy!" William Clark is understandably excited to see the Pacific Ocean for the first time. Over eighteen months, he has traveled 3,700 miles (5,955 km) before reaching the mouth of the Columbia River, where the waves of the Pacific finally break into view. He and his companion, Meriwether Lewis, started out from St. Louis, Missouri, in May 1804, leading a group of about forty. Their urgent mission came at the request of President Thomas Jefferson, who wants to know just what the United States acquired with the Louisiana Purchase a year prior. Many Americans back east are quite eager to learn of the geography, resources, and inhabitants of this vast addition to the country's territory, especially its potential for settlement and trade.

That fall, Lewis and Clark and their Corps of Discovery worked their way up the Missouri River using a keelboat and two pirogues—narrow, flat-bottomed boats similar to canoes. The expedition established winter quarters at

Fort Mandan, in present-day North Dakota. When the weather warmed, they headed west over the Rocky Mountains, eventually following the Columbia River westward to the coast. Now, on November 7, 1805, Clark writes of sighting the Pacific at last and hearing the roar of "the waves breaking on the rocky shores." It will be nearly another year before they return to St. Louis in September 1806, greeted with fanfare and celebrated as national heroes for their remarkable journey.

The expedition's two leaders have had plenty of help during their quest. Their team, known as the Corps of Discovery, includes thirty-seven soldiers and military officers. A dozen ***civilian*** *boatmen have also assisted in navigating the rivers of the West. York, an enslaved African American man, has hauled goods, carried boats, and hunted game. Despite these efforts, York will not receive any payment or land, unlike the other members of the Corps of Discovery. The French Canadian fur trader Toussaint Charbonneau, fluent in the languages of some Native American peoples, joined the party at Fort Mandan to help them communicate. His wife, a Shoshone woman named Sacagawea, has also served as an interpreter and helped establish friendly relations with some of the Indigenous peoples they came into contact with. In fact, most of the Native American groups that the Corps have encountered approached them on terms of friendship and trade. Some, such as the Nez Percé, offered lifesaving assistance in the form of food and horses. Other groups, who perceived the Corps as unfamiliar and unwanted trespassers, were wary and sometimes reacted with hostility.*

Officially, the main purpose of the Lewis and Clark expedition is commercial. President Jefferson, who authorized the purchase of the Louisiana Territory, wants to find a river route across the North American continent. Such a route, he realizes, will have many benefits for trade and communications. Yet the expedition will also provide the United States with valuable insights that will deepen the scientific, geographic, and cultural understanding of its new, expansive territory. Subsequent expeditions, like those of William Dunbar and George Hunter, will further open the West to American settlement. With this will come an increasing sense that the United States is destined to stretch from the Atlantic in the east to the Pacific in the west.

A New Century, a New President

The U.S. electoral system changed considerably during the first few presidential terms. Washington, a war hero, won easily in 1788 and 1792, elected unanimously by the Electoral College. He remained a largely nonpartisan president, even though he favored Federalist ideas. By the election of 1796, two rival political parties—Federalists (advocating for a strong central government) and Democratic-Republicans (favoring states' rights and limits on federal power)—had clearly emerged in American politics. As you read in the previous topic, John Adams, who won that year, was a staunch Federalist.

Then as now, there was a popular vote for president, and then the president was chosen by the Electoral College. (In the nation's earliest elections, some state legislatures directly chose those electors, not the voting public.) Each state receives as many electors in the Electoral College as it has members of Congress, and the electors vote based on the votes of citizens in their states. However, under the original Constitution, the vice president was simply the runner-up in the election—the person who received the second-largest number of electoral votes. As a result, in the early years of the United States, the president and vice president could be from different political parties and have widely different policy views. This happened in 1796, when Democratic-Republican Thomas Jefferson received sixty-eight electoral votes to Adams's seventy-one and served alongside his Federalist rival as vice president.

Think Twice

Based on what you have learned about the Federalists, how would you expect Adams and Jefferson, who was not a Federalist, to differ in their policy goals?

The Election of 1800

These two parties clashed again in 1800, when Adams and Jefferson again competed for the presidency. This time, however, the parties advanced *pairs* of candidates that they hoped would become president and vice president, respectively. Jefferson's running mate was the New York City lawyer and American Revolution officer Aaron Burr.

Though Jefferson and Burr ran as a pair, the Electoral College still did not distinguish between the presidential candidate and the vice presidential candidate. When Jefferson and Burr tied at seventy-three electoral votes each, the official decision on who should become president fell to the House of Representatives, to which the Constitution gives the responsibility to break ties. Adams's Federalist allies still held a majority there. For a week in February 1801, the House cast vote after vote without deciding whether Jefferson or Burr should become president.

It took thirty-six ballots before the House gave a clear majority to Jefferson. Despite this controversy, there was a peaceful transfer of power from President Adams, a Federalist, to the new President Jefferson—an important precedent that would become a cornerstone of American democracy.

How, barely a decade into its existence, had the presidency of the United States become so bogged down in partisan politics? Whether they supported or opposed Jefferson, many legislators recognized that weeks-long congressional debates were not how the president ought to be chosen. To prevent such outcomes in the future, Congress soon proposed the Twelfth Amendment, which introduced the modern system of voting separately for president and vice president. This amendment was ratified in June 1804, just in time for the next presidential election.

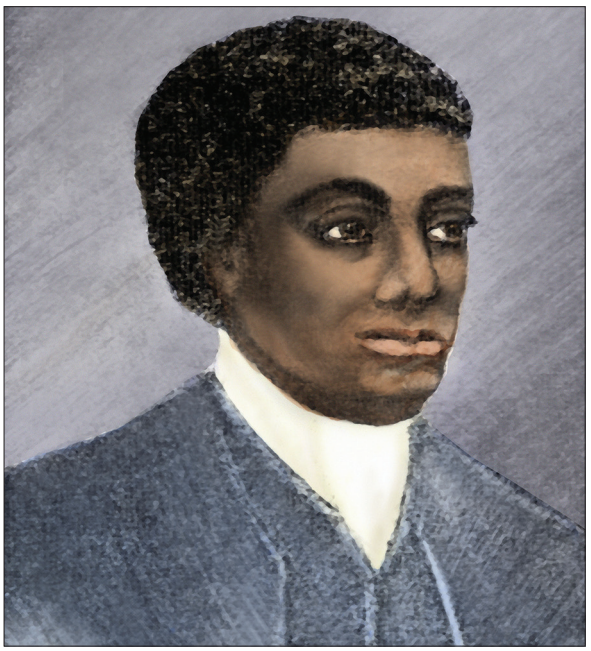
Think Twice

What problem did the Twelfth Amendment solve?

President Jefferson's Policies

Meanwhile, Thomas Jefferson took office on March 4, 1801, and proceeded to serve two consecutive terms. As president, Jefferson sought to promote agriculture, which he viewed as the main engine of the American economy. Jefferson believed that independent, self-sufficient family farmers were key to maintaining a republic. In this, he differed from Federalists, who thought that industry and commerce should be the priority. Jefferson sought to create a "wise and frugal government," meaning one that was neither too large nor too costly to maintain. Accordingly, he cut the national debt by about one-third, reduced the number of government employees, and substantially reduced the size of the military. He also repealed, replaced, or allowed to expire some of Adams's policies, including most portions of the Alien and Sedition Acts.

Like several early leaders of the United States, Jefferson opposed slavery in principle even as he continued to practice it himself; in other words, he was both a supporter of **abolition**



Jefferson's status as a slaveholder brought criticism from Benjamin Banneker, the African American author and surveyor who had helped plan the city of Washington, D.C. The two corresponded in a series of letters in which Banneker questioned the contradiction between Jefferson's ideals and his actions.

in theory and a slaveholder in practice. During his second term, Jefferson signed into law the 1807 Act Prohibiting the Importation of Slaves. As one of several compromises reached during the Constitution's ratification in 1788, Congress was prevented from restricting the international slave trade for twenty years; therefore, the law did not take effect until 1808.

The act brought an end to the international slave trade at about the same time that the trade was banned in Great Britain. It did not, however, ban slavery or the domestic slave trade, which thrived for the next sixty years. Any further abolitionist measures were left to the states. Some, like Massachusetts, had already passed laws banning slavery; others, such as Pennsylvania, took a gradual approach to prohibiting it. The restriction on international trade was not wholly effective. Smugglers continued to traffic enslaved persons through less carefully surveilled ports in Louisiana and Florida, but on a greatly reduced scale. By 1820, severe anti-piracy laws and stricter enforcement had caused even the smuggling of enslaved persons to significantly decline.

Officially, the 1807 law meant that any enslaved person in the United States who was born after 1808 had been born *in* the United States. As you will read in the next topic, this distinction became legally significant with the passage of the Fourteenth Amendment in 1868, which conferred birthright citizenship on formerly enslaved persons.

Think Twice

How did Jefferson's presidency break with Federalist policies and ideas?

Marbury v. Madison

A legal decision marked a key event during Jefferson's presidency. *Marbury v. Madison* was a U.S. Supreme Court case based on events that arose when Jefferson tried to prevent federal judges appointed by Adams from taking office. Adams had nominated the judges shortly before leaving office, timing that led to the nominees being known as "midnight judges." Adams's nominees had been confirmed by the Senate before Jefferson was inaugurated, but their commissions—the formal paperwork authorizing their appointment—had not been delivered. Upon taking office, Jefferson ordered his own secretary of state, James Madison, not to deliver the commissions.

In response, one of the appointees whose commission had not been finalized, William Marbury, sued. Marbury asked the Supreme Court to order Madison to deliver the commission so that he could properly serve as a federal judge. The court found that it did not have the authority under the Constitution to issue such an order. Instead, the justices found that Marbury had only been allowed to bring his case to the Supreme Court because Congress had expanded the court's jurisdiction when

it passed the Judiciary Act of 1789. The court **struck down** part of that law, stating that Congress had overstepped its own powers and deeming much of the 1789 law **unconstitutional**. Although Marbury never ended up serving as a judge, *Marbury v. Madison* was an important case because it established the concept of **judicial review** in the United States. This is the principle that courts can void or overturn laws that violate the Constitution and are thus unconstitutional. If Congress or state legislatures pass such a law, judges can declare it void. This helped establish the judiciary's role as a coequal branch of government with the power to check actions by the other branches.

Think Twice

How did *Marbury v. Madison* affect future court decisions in the United States?

The Louisiana Purchase

One of the most consequential events of Jefferson's presidency was the Louisiana Purchase. This was the acquisition in 1803 of an enormous tract of land from France. Much of this land had been explored by fur trappers and traders, and nearly all of it was home to Indigenous groups and nations. However, the people and government of the United States had little knowledge of the territory or how to navigate it, inspiring Lewis and Clark's famous expedition a year later.

The impetus for the purchase was the United States' desire to control New Orleans, the major port at the mouth of the Mississippi River. In 1798, Spain—which controlled the Louisiana Territory at the time, following a long period of French control—had revoked the United States' "right of deposit," an agreement that had previously allowed American merchants to utilize the crucial port of New Orleans to their economic benefit. In 1800, Spain had returned control of the Louisiana colony, including New Orleans, to France in a secret treaty known as the Treaty of San Ildefonso. Although France took possession of Louisiana in 1802, the formal transfer did not happen until the following year, 1803. Jefferson was anxious about the potential of French forces in North America, writing to Robert Livingston, his ambassador to France, "There is on the globe one single spot, the possessor of which is our natural and habitual enemy. It is New Orleans, through which the produce of three eighths of our territory must pass to market."

Jefferson began planning a negotiation with France to purchase the city, appointing James Monroe to meet Livingston in France to negotiate the purchase of New Orleans and West Florida for a price as high as $10 million. At the same time, French leader Napoleon Bonaparte's plans in Louisiana had been derailed by the significant loss of forces in the French sugar colony of Saint-Domingue. There, members of France's army

The Louisiana Purchase vastly expanded the United States' continental territory. This illustration shows the Louisiana Territory, a vast region stretching west from the Mississippi River to the Rocky Mountains.

had perished in large numbers, mostly due to disease, while unsuccessfully attempting to suppress an uprising of enslaved persons against their French colonial enslavers. Unforeseen by Napoleon, the conditions in Saint-Domingue had huge ramifications for American history: Now willing to part ways with their North American possessions, the French offered to sell the *entirety* of French Louisiana—not today's state, but a huge territory comprising some eight hundred thousand square miles (more than 2 million sq km) of land.

The Americans, largely stunned by the offer, eagerly agreed to pay $15 million, which was only $5 million more than the original offer Jefferson had prepared for New Orleans alone. Adding the Louisiana Purchase to U.S. territory meant that the United States now stretched more than three-quarters of the way across the North American continent, from present-day Maine to Montana. This was enormous territorial growth for a country that had ratified its constitution only fifteen years earlier.

PRIMARY SOURCE: THOMAS JEFFERSON TO JOHN B. COLVIN, 1810

The Louisiana Purchase was a controversial political decision. According to Thomas Jefferson's strict interpretation of the Constitution, the purchase was not exactly constitutional. In September 1810, after he had left the presidency, Jefferson wrote to John B. Colvin, a newspaper editor, responding to a question about his decision to disregard his own personal belief in order to make the purchase.

The question you propose, Whether circumstances do not sometimes occur which make it a duty in officers of high trust to assume authorities beyond the law, is easy of solution in principle, but sometimes embarrassing in practice. A strict observance of the written laws is doubtless *one* of the high duties of a good citizen: but it is not *the highest*. The laws of necessity, of self-preservation, of saving our country when in danger, are of higher obligation. To lose our country by a scrupulous [strict or exact] adherence to written law, would be to lose the law itself, with life, liberty, property & all those who are enjoying them with us; thus absurdly sacrificing the end to the means. . . .

. . . It is incumbent on those only who accept of great charges, to risk themselves on great occasions, when the safety of the nation, or some of its very high interests are at stake.

Source: Jefferson, Thomas. Letter to John B. Colvin, September 20, 1810. Founders Online. National Archives. https://founders.archives.gov/documents/Jefferson/03-03-02-0060.

The Louisiana Purchase essentially ended France's colonial presence in North America, though it still held a few islands in the Caribbean and near Newfoundland. Meanwhile, the increase in U.S. territory had large and long-lasting effects on the nation's politics and culture. It led to a wave of westward settlement, sparking conflict with Indigenous peoples. Throughout the early nineteenth century, the U.S. government would adopt ever-harsher policies of forced removal to relocate or even exterminate Native American populations.

The Louisiana Purchase also worsened the North–South divide between "free states" and "slave states." Each time a segment of the territory applied for statehood, the delicate balance between those states that allowed and prohibited slavery was threatened, and the tension between Northern and Southern states intensified. Southern legislators wanted to protect the institution of slavery, and with it, the

South's plantation-based economy; Northern legislators wanted to halt slavery's expansion and protect their right to prohibit the practice within their borders.

During Jefferson's eight years in office, the country changed dramatically. Its territory nearly doubled, resulting in the opening up of a new frontier, often to the detriment of Indigenous communities. Spain, not France, was now the United States' nearest western neighbor through its colonial control of Mexico, though it would soon lose control of that land in the Mexican War of Independence (1810–21). A distinct American national identity was emerging, but it was undercut by regional tensions between an industrializing, modernizing North and an agrarian, traditionalist South reliant on enslaved labor.

Think Twice

Identify one positive and one negative effect of the Louisiana Purchase.

President Madison and the War of 1812

The Democratic-Republicans continued to gain power in the election of 1808. James Madison, who had served as secretary of state under Thomas Jefferson, became the fourth president of the United States. Like Jefferson, he served for two terms, from 1809 to 1817.

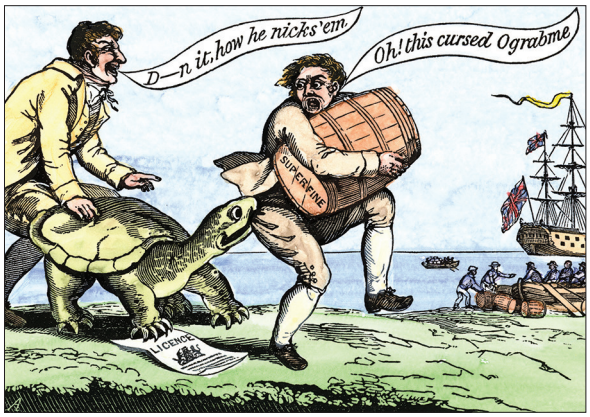
Settling the western frontier and maintaining national unity were major concerns for Madison, who had been a supportive secretary of state during the Louisiana Purchase.

As one of the authors of the Federalist papers, Madison had long been more sympathetic to a strong federal government than Jefferson had been. A major war in the middle of his presidency—the War of 1812—provided him with the opportunity to expand both the military and federal control over trade and the economy.

Causes of the War of 1812

In Europe, the Napoleonic Wars (1803–15) intensified during Jefferson's time in office. This series of conflicts, in which France and Britain were the most powerful parties, spilled over into the countries' colonial territories in various ways. Though the United States remained neutral, both Britain and France took advantage of the small and poorly armed American navy. The two warring nations seized American merchant ships and their goods under the pretext that these ships were trading with the other side and thus participating in the war. The British Royal Navy also took up the practice of **impressment**, or capturing American sailors and forcing them to work on British ships.

By the end of the first decade of the nineteenth century, Americans were enraged by British treatment of American sailors and



In an attempt to keep the United States from being drawn into the Napoleonic Wars on either side, President Jefferson and his allies in Congress passed the Embargo Act in 1807, which eventually banned American maritime trade with France and Britain. This cartoon depicts the Ograbme (*embargo* spelled backward) as a snapping turtle that delivers painful and disabling bites to those engaged in trade.

merchants. Many Americans also believed that British alliances with various Native American groups were resulting in more powerful—and better-armed—resistance to the settlement of the Northwest Territory. Some even believed the British had hopes of regaining their American colonies. On June 18, 1812, in its first use of its constitutional power to do so, Congress narrowly passed a declaration of war against Great Britain.

Fighting on Land and Sea

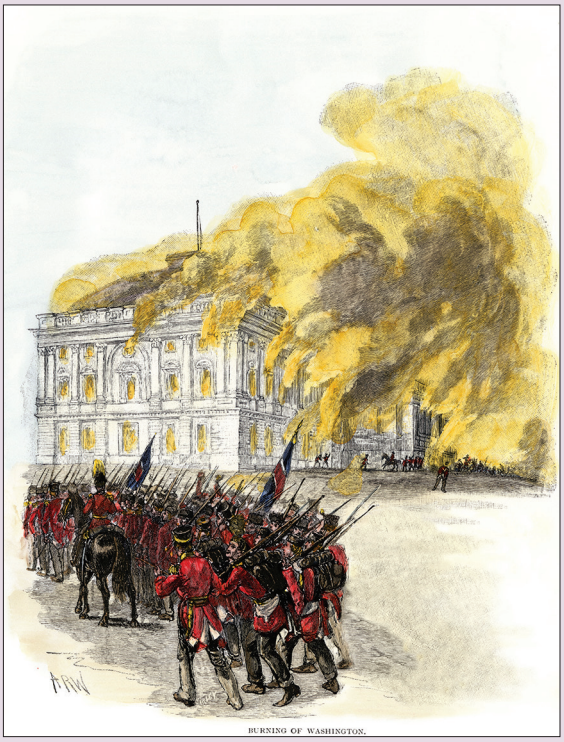
Actual fighting began in the summer of 1812 when the United States invaded Canada in hopes of weakening Britain's ability to support Native American resistance in the Northwest. The invasion was ineffective, as were other U.S. land attacks until the spring of 1813. At sea, however, American captains triumphed against their British counterparts, while privateers—in essence, pirates who operated with official government permission—preyed on British merchant vessels, ultimately seizing more than 1,700 ships. Britain's larger navy eventually imposed a blockade on most of the U.S. coast, which was disastrous for the American economy and for the movement of American warships.

In 1813, U.S. forces successfully captured land in Canada. Additionally, in the South, U.S. forces attempted to exploit a civil war among the Muscogee people, also known as the Creek, who were divided on whether to support the Americans' efforts against the British. A year of fighting in present-day Alabama and Georgia ensued, in what is now known as the Creek War. In August 1814, the United States forced the Creek to sign the Treaty of Fort Jackson. This treaty required the cession of all Creek land in Georgia and much of what is now Alabama.

When the Napoleonic Wars ended in Europe, fresh British forces arrived in North America. They not only undid U.S. gains in Canada but also pressed into New England and launched an invasion of the Gulf Coast. In August 1814, they captured Washington, D.C., and set fire to the Capitol and the White House. Meanwhile, U.S. naval forces did enjoy some success, and in September, U.S. forces fought off an attack on Baltimore. The sight of the battle inspired Francis Scott Key to compose "The Star-Spangled Banner," which would later become the U.S. national anthem.

The Burning of the (First) White House

When British troops marched on Washington, D.C., and burned the White House, the presidential residence had stood for little more than a decade, still a work in progress when John and Abigail Adams arrived in 1800. Although First Lady Dolley Madison and others were able to save some items and papers of historical significance before fleeing the British in 1814, the building itself was almost completely destroyed. This loss, as well as the burning of the Capitol building, not only served as a strategic victory for the British but also was a devastating blow to American morale. The destruction of key national landmarks symbolized the young nation's fragility in a time of crisis. A new White House was built in time for James Monroe to take residency in 1817, though additions to the structure—including its now-iconic wings and porticos—were made throughout the nineteenth century.



By the end of 1814, Britain had finally come to the negotiating table. After two years of fighting, the British Army had been unable to take and keep any significant American territory, and those at home were growing frustrated with the prolonged war. Officially, the war ended on December 24, 1814, with the signing of the Treaty of Ghent.

However, fighting continued during and even after the seven weeks that it took for the treaty to travel via ship from its signing location in Belgium to the United States for ratification. This included the last major had battle of the war at New Orleans in January 1815. There, an American force commanded by Andrew Jackson rapidly defeated a much larger and better-equipped British force, suffering just seventy-one casualties to the British Army's two thousand. The lopsided victory at the Battle of New Orleans made Andrew Jackson a national hero and propelled him into the national spotlight.

Think Twice

Identify one success and one challenge for U.S. forces during the War of 1812.

Though the Battle of New Orleans was fought two weeks after the treaty ending the war was signed, the victorious General Andrew Jackson was celebrated as a war hero and went on to serve as the nation's seventh president.

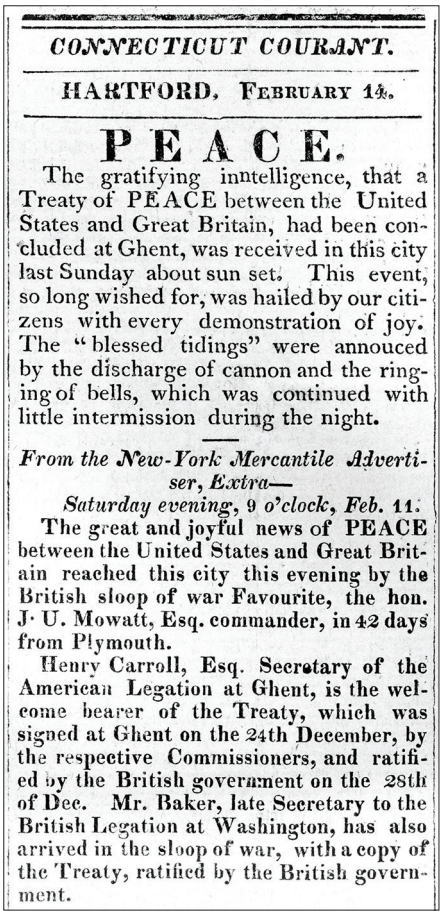
The Treaty of Ghent

As lengthy and costly as it was, the War of 1812 effectively ended in a draw. With the Treaty of Ghent, neither side ceded any territory. Nor did the Indigenous nations that had fought alongside the British gain any formal recognition of their territorial rights. In fact, the Treaty of Ghent did not even completely resolve border disputes with Britain. A series of later treaties were necessary for that purpose.

In some ways, the Treaty of Ghent represented a victory for the Americans, who had proved themselves against an ostensibly much more powerful imperial enemy. It also helped reinforce a sense of American unity, despite the rising divisiveness of North–South regional differences. The treaty further contributed to American leaders' growing sense of manifest destiny—the belief that the United States was destined to expand across North America and span the continent from ocean to ocean.

Think Twice

What were the outcomes of the War of 1812?



CONNECTICUT COURANT.

HARTFORD, FEBRUARY 14.

PEACE.

The gratifying inntelligence, that a Treaty of PEACE between the United States and Great Britain, had been concluded at Ghent, was received in this city last Sunday about sun set. This event, so long wished for, was hailed by our citizens with every demonstration of joy. The "blessed tidings" were annouced by the discharge of cannon and the ringing of bells, which was continued with little intermission during the night.

From the New-York Mercantile Advertiser, Extra—

Saturday evening, 9 o'clock, Feb. 11.

The great and joyful news of PEACE between the United States and Great Britain reached this city this evening by the British sloop of war Favourite, the hon. J. U. Mowatt, Esq. commander, in 42 days from Plymouth.

Henry Carroll, Esq. Secretary of the American Legation at Ghent, is the welcome bearer of the Treaty, which was signed at Ghent on the 24th December, by the respective Commissioners, and ratified by the British government on the 28th of Dec. Mr. Baker, late Secretary to the British Legation at Washington, has also arrived in the sloop of war, with a copy of the Treaty, ratified by the British government.

When news of peace finally arrived in the United States, it was received with great cheer by war-weary Americans.

The Era of Good Feelings

Americans emerged from the War of 1812 feeling more united and nationalistic than ever, despite continuing tensions around the practice of slavery. The Federalist Party had opposed the war and came to be viewed by much of the American public as increasingly unpatriotic; the party lost much of its national support and soon faded from relevance. The Democratic-Republicans, who had come to be associated with **nationalism**, became by far the most popular party of the day.

James Monroe, Madison's secretary of state and briefly his secretary of war, won the 1816 election in a landslide against Federalist diplomat and senator Rufus King. Like the previous two presidents, Monroe was a Democratic-Republican. However, the Federalists were so weak by this time that the presidential campaign was not really a partisan contest. For the next eight years, the policies favored by Democratic-Republicans would enjoy wide approval. The political unity of the period around and including the Monroe presidency (1817–25) led to the nickname of the "Era of Good Feelings."

Despite its optimistic nickname, the Era of Good Feelings included serious political and economic challenges. Monroe and his cabinet had serious problems to contend with. While the Treaty of Ghent settled some

Unlike other Founding Fathers, President James Monroe did not appear on U.S. currency in the nineteenth or twentieth century. He was, however, commemorated in postage in 1904.

disagreements with Britain, it left the status of the Oregon Country ambiguous. There was also conflict with the Spanish Empire.

In the Southeast, Florida was still a Spanish possession—called "the Floridas" because it was divided into the provinces of East and West Florida. Spanish leaders long resisted the idea of selling the territory. The United States had claimed West Florida as part of the Louisiana Purchase, a position disputed by Spain. Yet the Spanish had found the Floridas costly to settle and defend. Faced with economic and political concerns in other parts of the world, Spain agreed to cede the Floridas to the United States for a combination of money, favorable trade status, and recognition of Texas as part of New Spain. In 1819, the two countries formalized this agreement as the Adams–Onís Treaty, named for John Quincy Adams and Spanish diplomat Luis de Onís. The treaty also resolved issues regarding New Spain's borders with the Oregon Country and the southwestern United States.

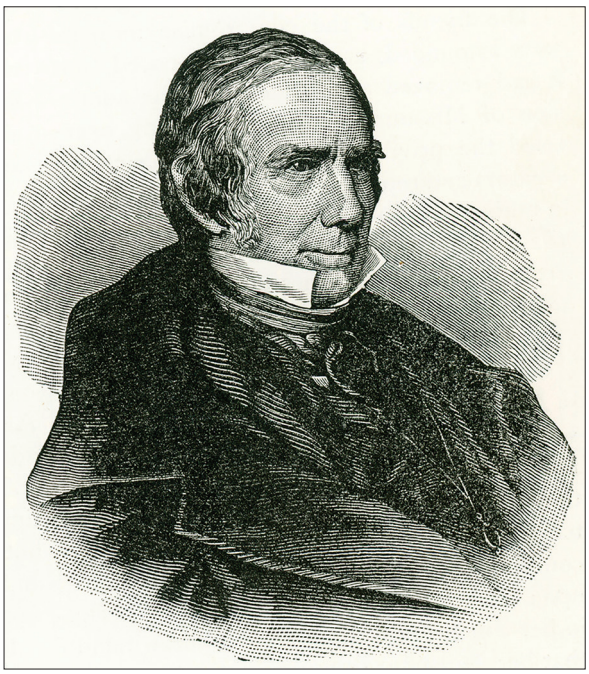
Think Twice

What developments gave the Era of Good Feelings its nickname?

The American System

Another outcome of postwar nationalism was the American System, a set of economic policies promoted by Kentucky congressman Henry Clay and enacted under Monroe. Clay argued for policies that would unify the nation economically and protect it from foreign competition. The unifying projects included the building of infrastructure such as canals and roads, along with the creation of a central bank—the Second Bank of the United States—to help regulate the economy and keep the value of the U.S. dollar stable.

The protectionist aspect of the American System came in the form of **tariffs** on imported goods. These were popular among Northern manufacturers, who had to compete with imported goods, but less so among Western and Southern farmers and miners. However, many of those farmers did not protest the tariffs strongly. This was



Kentucky statesman Henry Clay, known as the "Great Compromiser," was an architect of the American System and a supporter of the Missouri Compromise.

due to the fact that the South already had access to an extensive market, abroad as well as domestically, for its most valuable crop: cotton. Also, the infrastructure projects would primarily benefit the economies of the West and the South, whose residents were still underserved by a limited number of roads and transportation options. In Clay's view, the American System fairly distributed benefits and costs among the regions, for the betterment of all.

A major test for the American System came in 1819. An overabundance of paper money led to widespread **inflation**, or a general increase in prices over time. Banks were also lending money widely with low interest rates and little regulation. This easy-credit environment fueled government land sales in the South and West, where many speculators took out loans to buy land in hopes of selling it at a profit. The Second Bank of the United States tried to rein in inflation by making fewer loans to state banks and thus limiting the supply of money in circulation.

When it came time for the state banks to pay back their loans from the Second Bank, they demanded payment from their own debtors: Southern and Western farmers. But these farmers were facing their own issues with overproduction and foreign competition and were unable to pay their loans. Many lost their farms, helping cause a **recession** that began to lift only in 1821, when Congress passed debt-relief measures for landholders.

Think Twice

Explain the regional issues involved in the American System.

The Monroe Doctrine

By the start of Monroe's presidency, the United States seemed secure in its position in North America. It had twice defended itself against the British Empire, expelled the French Empire, and consolidated and expanded its territory. Yet concerns remained over European influence in the Americas. Spanish colonies throughout Latin America were following Mexico, Chile, and Argentina in demanding independence from their colonial rulers. President Monroe and his secretary of state, John Quincy Adams, were concerned about how the Spanish might respond. In his 1823 address to Congress, Monroe laid out what is now known as the Monroe Doctrine: a promise to respect, and if necessary protect, the independence of these newly sovereign Latin American countries. Monroe believed that the United States' commercial interests would be better served by encouraging the growth of independent nations in Latin America—nations that could become trading partners and allies—rather than allowing the reestablishment of European colonial rule. For this reason, Monroe declared that the United States was prepared to go to war on behalf of these countries

and would treat any further European colonization in the Western Hemisphere as an act of aggression:

> The citizens of the United States cherish sentiments the most friendly in favor of the liberty and happiness of their fellow-men on that side of the Atlantic. In the wars of the European powers in matters relating to themselves we have never taken any part, nor does it comport with our policy to do so. It is only when our rights are invaded or seriously menaced that we resent injuries or make preparation for our defense. . . . We . . . declare that we should consider any attempt on [the European powers'] part to extend their system to any portion of this hemisphere as dangerous to our peace and safety.

The Monroe Doctrine angered European leaders and emboldened Latin American revolutionaries. The latter, however, doubted that the United States would *really* come to their aid in a war against their imperial rulers. Their doubts were not unfounded. In the 1830s and 1840s, the United States failed to protect Argentina against British and French naval blockades. Over the rest of the century, however, the Monroe Doctrine gradually broadened into a policy of U.S. interventionism not only in Latin America but also throughout the Western Hemisphere. The belief that the United States was the hemisphere's dominant power helped bolster the sense of manifest destiny on the North American mainland and, much later, provided a rationale for both the **annexation** of Hawaii and the Spanish-American War in 1898.

Think Twice

Explain whether the Monroe Doctrine reflects continuity or change in U.S. foreign policy since the presidency of George Washington.

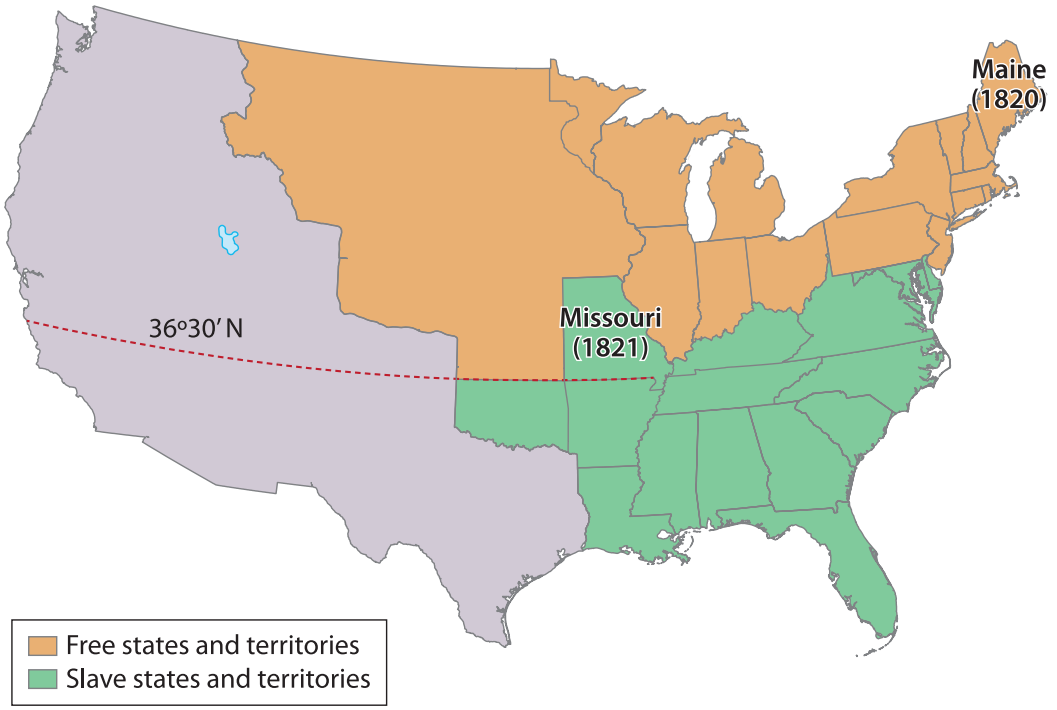
The Missouri Compromise

Domestically, the country's greatest challenge during Monroe's presidency was resolving the many disagreements that arose between so-called slave states, where slavery was legal, and free states, where slavery was forbidden. Many Americans believed that a balance must be preserved between the two for the government to continue functioning. Yet each group also had a vested interest in seeing its system spread to newly admitted states. Leaders from Southern states strived to preserve an agricultural system that depended on enslaved labor. Many Northerners opposed the expansion of slavery into new states, arguing that its spread would entrench the institution further and hinder the growth of paid labor.

After Alabama was admitted as a slave state in 1819, the balance of power between the states was split evenly, with eleven free states and eleven slave states. Both groups had

equal representation in the Senate. Then in 1819, the Missouri Territory sought statehood. At first, congressional leaders proposed that slavery be permitted in Missouri with some restrictions. Congressman James Tallmadge of New York proposed an amendment allowing Missouri to become a state only if it gradually abolished slavery. Southern legislators strongly opposed Tallmadge's condition, viewing it as a federal intrusion into state sovereignty. They asserted that states' rights to make their own internal laws, as set forth in the Constitution, should bar the federal government from dictating whether a state placed any restrictions on slavery. Instead, the situation was resolved by a different compromise. Missouri would be admitted as a slave state, and Maine, previously a territory of Massachusetts, would be admitted as a free state. This plan would also preserve the balanced representation of slave and free states in the Senate, a key concern for both regions. The Missouri Compromise also promised to settle the status of any future states created from the western territories: A line was drawn at the parallel 36°30′ north; slavery would be prohibited in new states north of this line

The Missouri Compromise Line



Under the Missouri Compromise, Maine was admitted as a free state in 1820, and Missouri was admitted as a slave state the following year. Any states admitted in the future could permit the practice of slavery if located below the parallel 36°30′ north.

and permitted in new states south of it. The Missouri Compromise prevailed for nearly thirty-five years, through the admission of seven additional states to the union. Though it failed to fully satisfy either side, people believed it had preserved national unity, at least for the time being.

Think Twice

Explain how the Missouri Compromise addressed the issue of slavery in new U.S. territories.

The Jacksonian Era

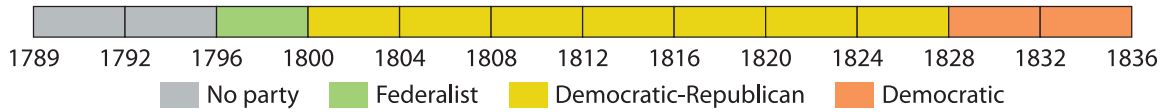
John Quincy Adams, the son of John Adams, succeeded Monroe as president and served a single term, from 1825 to 1829. He was the winner of an electoral contest among four different candidates, all Democratic-Republicans. Andrew Jackson of Tennessee won the popular vote but not the Electoral College majority. This meant that the House of Representatives—whose Speaker, Henry Clay of Kentucky, was himself a presidential candidate—would have to decide the election. The House chose Adams, largely due to the influence of Clay, who threw his support behind Adams after he was eliminated. Soon after, Adams appointed Clay as secretary of state, a move Jackson's supporters denounced as a "corrupt bargain." This controversy left many disaffected with the perceived corruption of the Democratic-Republican Party and ready to rally behind Jackson in the subsequent election.

In the meantime, Adams continued to promote the American System, as he had done during his time as Monroe's secretary of state. Though formally a Democratic-Republican, Adams attempted to expand federal power, throwing his support behind the ideas of a national university, a national observatory, and a naval academy. He secured congressional backing for large-scale improvements to the nation's roads, canals, and waterways. In addition to his diplomatic successes as secretary of state, these major infrastructure projects are perhaps Adams's most significant achievements as president.

Adams's more ambitious plans were largely defeated in Congress as his Democratic-Republican Party fractured into two parties: the National Republicans and the Democrats. The National Republicans, who included many onetime Federalists, supported Adams's vision of a strong, active federal government. The Democrats opposed Adams, campaigning on a platform of states' rights, support for agriculture, and opposition to what they saw as elitist federal overreach—all ideas that enjoyed wide popularity in the agrarian South.

John Quincy Adams was succeeded by Andrew Jackson, the first president from the newly formed Democratic Party. Jackson was

Presidential Election Winners by Political Party, 1789–1832



This timeline shows the political party of every winner of a presidential election from the founding of the United States through the reelection of Andrew Jackson in 1832.

widely remembered by voters as a war hero from the Battle of New Orleans in 1815. As a general, he had also played a leading role in the Creek War and had come to be seen as harsh and uncompromising. Moreover, the self-educated and fierce-tempered Jackson came from a poor rural background, striking many voters as a relatable "everyman" figure.

Andrew Jackson won the 1828 electoral vote by a two-thirds majority and used a form of political **patronage** known as the spoils system to consolidate his power. As you will read next, he adopted hardline policies on two major issues of the day: the federal government's role in the economy and the nation's treatment of Native Americans.

Think Twice

How did John Quincy Adams's policies reflect his status as a former Federalist?

The Bank War

Jackson was a staunch opponent of the Second Bank of the United States, which, as you read, was a key piece of Henry Clay's American System. Like Jefferson and Madison, Jackson claimed that Congress lacked the constitutional authority to create a national bank, despite supporters' claims that the power fell within the scope of the Constitution's necessary and proper clause. Furthermore, the Supreme Court had upheld the bank's constitutionality in *McCulloch v. Maryland* in 1819. Because the national bank took on a role that state banks would otherwise have played, Jackson saw the bank as a symbol of federal encroachment on states' rights. Further, Jackson argued that the national bank mainly benefited wealthy merchants, investors, and industrialists at the expense of ordinary Americans.

When the bank's charter came up for renewal in 1832, Jackson refused to sign it into law. The resulting disagreement became known as the Bank War. The conflict was one of the first great clashes between the Democrats and the National Republicans. It laid the groundwork for the rise of the Whig Party, which would become the main opposition to Jacksonian Democrats in the years to come. When Jackson vetoed the bill to renew the bank's charter, he argued that the president should be able to determine, independently of Congress and the Supreme Court,

In political cartoons such as this one from 1834, the Bank War was characterized as a struggle between Jackson (seated) and congressional leader Henry Clay.

whether an institution like the Second Bank was constitutional.

Jackson's claims drew harsh opposition from his opponents in Congress, who rebuked him for what they considered to be an overreach of his powers, even as they acknowledged that the Constitution allowed a president to veto a bill. A majority of senators voted again to renew the bank's charter—but not the two-thirds supermajority needed to override a veto. When the charter expired in 1836, the bank was privatized, beginning a decades-long period when the United States had no national bank at all.

Think Twice

How did Congress and Andrew Jackson diverge in their opinions of presidential power during the Bank War?

The Trail of Tears

After the War of 1812 and the treaties that followed it, many in the United States saw the West—which typically meant lands lying west of the Appalachians, toward the Mississippi River—as land waiting to be settled. While they recognized that Native American nations lived on this land, they nonetheless wanted the land for themselves. U.S. leaders frequently referred to this issue as "the Indian problem," a term that reflected their belief that Indigenous presence in the West was an obstacle to American expansion. There was widespread debate about how to treat these Indigenous peoples and their leaders. Some U.S. leaders, such as John Quincy Adams, had called for policies that would encourage Native Americans to either **assimilate** into U.S. society or consensually relocate west of the Mississippi River. Others, such as Jackson, urged forced removal. Nonetheless, there was a broad consensus within American politics that Indigenous nations would, one way or another, have to be relocated for the project of western settlement to proceed. The debate was one of *how*, not *whether*, this would be done.

Indigenous peoples, such as the Cherokee in Georgia, naturally resisted any such attempt

PRIMARY SOURCE: ANDREW JACKSON TO THE CHEROKEE, 1835

Elected president in 1828, Andrew Jackson supported the removal of Indigenous peoples from their homelands, including the Cherokee, who had lived in Georgia long before it became a U.S colony or state. Jackson argued that Indigenous peoples' survival depended on separation from white people. In this 1835 circular to the Cherokee people, Jackson lays out his case for removal.

I have no motive, my friends, to deceive you. I am sincerely desirous to promote your welfare. Listen to me, therefore, while I tell you that you cannot remain where you now are. Circumstances that cannot be controlled, and which are beyond the reach of human laws, render it impossible that you can flourish in the midst of a civilized community. You have but one remedy within your reach. And that is, to remove to the west and join your countrymen, who are already established there. And the sooner you do this, the sooner you will commence your career of improvement and prosperity. . . .

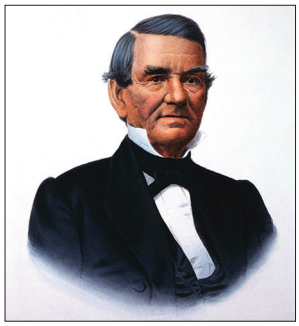
. . . The fate of your women and children, the fate of your people to the remotest generation, depend upon the issue. . . . As certain as the sun shines to guide you in your path, so certain is it that you cannot drive back the laws of Georgia from among you. Every year will increase your difficulties. Look at the condition of the Creeks. See the collisions which are taking place with them. See how their young men are committing depredations upon the property of our citizens, and are shedding their blood. This cannot and will not be allowed. Punishment will follow, and all who are engaged in these offences must suffer.

Source: Jackson, Andrew. "To the Cherokee Tribe of Indians East of the Mississippi River." *Niles' Weekly Register*, April 4, 1835.

at removal. They warned that it would be unjust and at odds with the religious values of many Americans and that removal from their homelands would be disastrous for the communities being uprooted. Cherokee leaders and those of many other Indigenous groups throughout the South objected to being lumped together; they were distinct nations with their own languages and cultures.

Jackson, however, won congressional support for a systematic policy of forced relocation, which he portrayed as a way to protect Native peoples. He signed the Indian Removal Act

PRIMARY SOURCE: CHEROKEE PETITION PROTESTING REMOVAL, 1836



John Ross

It will be seen, from the numerous subsisting treaties between the Cherokee nation and the United States, that from the earliest existence of this Government, the United States, in Congress assembled, received the Cherokees and their nation into favor and protection; and that the chiefs and warriors, for themselves and all parts of the Cherokee nation, acknowledged themselves and the said Cherokee nation to be under the protection of the United States of America, and of no other sovereign whatsoever: they also stipulated, that the said Cherokee nation will not hold any treaty with any foreign power, individual State, or with individuals of any State; that for, and in consideration of, valuable concessions made by the Cherokee nation, the United States solemnly guaranteed to said nation all their lands not ceded, and pledged the faith of the Government, that "all white people who have intruded, or may hereafter intrude, on the lands reserved for the Cherokees, shall be removed by the United States, and proceeded against, according to . . . the act, passed 30th March, 1802." The Cherokees were happy and prosperous under a scrupulous observance of treaty stipulations by the Government of the United States, and from the fostering hand extended over them, they made rapid advances in civilization, morals, and in the arts and sciences. Little did they anticipate, that when taught to think and feel as the American citizen, and to have with him a common interest, they were to be *despoiled by their guardian*, to become strangers and wanderers in the land of their fathers, forced to return to the savage life, and to seek a new home in the wilds of the far west, and that without their consent. An instrument purporting to be a treaty with the Cherokee people, has recently been made public by the President of the United States, that will have such an operation, if carried into effect. This instrument, the delegation aver before the civilized world, and in the presence of Almighty God, is fraudulent, false upon its face, made by unauthorized individuals, without the sanction, and against the wishes, of the great body of the Cherokee people.

Source: Memorial and Protest of the Cherokee Nation. H.R. Exec. Doc. No. 286, 24th Cong., 1st Sess. (1836).

in 1830, which authorized the forced removal of Native American communities under the pretext that they would be compensated with land west of the Mississippi. Two Supreme Court cases at that time show how the act was applied and its impact on the Cherokee Nation. In the first case, *Cherokee Nation v. Georgia* (1831), the Cherokee Nation demanded that the Supreme Court uphold earlier treaties respecting Cherokee territory and autonomy. But the court instead ruled that the Cherokee were a "domestic dependent nation" that could not sue U.S. states in the first place. The result of the second case, *Worcester v. Georgia* (1832), was somewhat more promising for the Cherokee: The court ruled that the Cherokee Nation's autonomy was protected by federal law and that state laws could not encroach upon it.

In 1835, the U.S. government sought to give legitimacy to the relocation of the Cherokee with the Treaty of New Echota, negotiated between Congress and a small group of Cherokee. Neither the Cherokee National Council nor John Ross, the nation's principal chief, accepted the treaty. Still, the existence of a treaty provided American leaders with a legal pretext for their later actions.

Using the disputed Treaty of New Echota as justification, Jackson's successor as president, Martin Van Buren, sent the U.S. Army to drive the Cherokee westward by force. Along with other southeastern Indigenous groups, the Cherokee were subjected to a 1,200-mile (1,930 km) march now known as the Trail of Tears. Roughly sixty thousand members of the Five Tribes—Cherokee, Choctaw, Muscogee (Creek), Chickasaw, and Seminole—trekked at gunpoint to the newly designated Indian Territory in present-day Oklahoma. These groups, referred to at the time as the "Five Civilized Tribes," had willingly adopted some elements of American society, yet still faced displacement. Thousands died en route from starvation, disease, and exposure to harsh conditions. Many more northerly Indigenous communities suffered similar fates due to Jackson's cruel solution to the so-called Indian problem.

Think Twice

How did the U.S. government behave toward Native Americans during the early nineteenth century, and what reasons did it give for its actions?

"Manifest Destiny!"

In the decades following the Louisiana Purchase, the United States changed dramatically. Its economy became much more industrialized, especially in the North. Steamboats now navigated major American rivers, speeding the travel of people and goods between urban centers and the frontier. This same steam power saw military use in newly developed armored warships.

The telegraph provided a way of transmitting signals along electrical wires. By 1861, an enormous network of telegraph cables crossed the continental United States.

Meanwhile, the country's first railroad, the Baltimore and Ohio, had opened in 1830, planting the seed of a rail system that would soon expand far inland from the coasts. An early electrical device, the telegraph, appeared in the late 1830s, providing a means of near-instant communication across long distances. You will read more about the impact of this revolutionary device in Unit 2.

As the Atlantic and Pacific shores seemed ever less remote, a journalist named John O'Sullivan promoted the idea that the country had a "manifest destiny to overspread the [North American] continent." Doing so, he argued, would provide space for a rapidly growing population while driving out European colonial powers in the process. Though O'Sullivan coined the idea's name, the concept of a transcontinental United States had long been supported by political leaders, who sought opportunities to buy, barter, or seize land from France, Spain, Britain, and Mexico. Throughout the first half of the 1800s, this pursuit of territorial expansion was the driving force of many of the country's policies.

The ideology of manifest destiny, and the technological changes that made it feasible, benefited some groups while devastating others. During the course of westward expansion, settlers—including many immigrants in search of a better life—had cleared forests and tilled prairies into farmland, increasing their own economic opportunities. This had negative effects for Native Americans, whose lands and traditional ways of life were regularly threatened and hurt.

Manifest destiny also highlighted how the differences between slave states and free states continued to widen as more and more territories were incorporated into the Union. By 1850, distinct geographic blocs had formed, with fifteen slave states in the South and fourteen free states in the North. As you will soon read, despite numerous attempts at compromise, civil war would come to be seen as inevitable over the following decade.

Think Twice

Explain the concept of manifest destiny in your own words.

PRIMARY SOURCE: JOHN O'SULLIVAN DECLARES AMERICA'S MANIFEST DESTINY, 1845

John O'Sullivan articulated the long-standing American belief in the God-given mission of the United States to lead the world in the transition to democracy.

Other nations have undertaken to intrude themselves . . . in a spirit of hostile interference against us, for the avowed object of thwarting our policy and hampering our power, limiting our greatness and checking the fulfilment of our manifest destiny to overspread the continent allotted by Providence [God] for the free development of our yearly multiplying millions. This we have seen done by England, our old rival and enemy; and by France, strangely coupled with her against us.

Source: O'Sullivan, John. "Annexation." *The United States Magazine and Democratic Review*, July–August 1845, p. 5.

This 1862 mural by Emanuel Leutze, entitled *Westward the Course of Empire Takes Its Way*, appears in the United States Capitol in Washington, D.C. It portrays westward expansion in vivid—and highly idealized—terms.

The United States and Texas

As Americans pursued further expansion in the late 1830s and into the 1840s, the country's relationship with neighboring Mexico became rocky.

Mexico had gained independence from Spain in 1821 and proceeded to encourage immigration to its then sparsely populated region of Texas to both boost its population and develop the region. American settlers obliged in large numbers. By 1830, these Texians, as they came to be known, greatly outnumbered both Indigenous populations and Tejanos, or Mexican Texans. The settlers increasingly resisted assimilation and defied Mexican laws, particularly those banning slavery, which many American settlers sought to preserve. Tensions soon escalated between Mexico and the United States. When Texas rebelled against the Mexican government in October 1835, many American volunteers joined the revolutionaries' Texian Army. Friendly American attitudes toward Texas stemmed in part from the fact that many Texians

The Alamo was the scene of a historic 1836 battle that rallied both Texian revolutionaries and American support for the Texian cause. Although the Texians lost the fight, the battle cry of "Remember the Alamo!" inspired many in later battles.

PRIMARY SOURCE: INAUGURAL ADDRESS, JAMES K. POLK, 1845

In his inaugural address, President James K. Polk discussed his vision for the United States, emphasizing the importance of westward expansion. Polk's address set the tone for his administration, highlighting his commitment to manifest destiny and territorial acquisition as key elements of his agenda.

I shall on the broad principle which formed the basis and produced the adoption of our Constitution, and not in any narrow spirit of sectional policy, endeavor by all Constitutional, honorable, and appropriate means to consummate the expressed will of the people and Government of the United States by the reannexation of Texas to our Union at the earliest practicable period.

Nor will it become in a less degree my duty to assert and maintain by all constitutional means the right of the United States to that portion of our territory which lies beyond the Rocky Mountains. Our title to the country of the Oregon is "clear and unquestionable," and already are our people preparing to perfect that title by occupying it with their wives and children. But eighty years ago our population was confined on the west by the ridge of the Alleghanies. Within that period—within the lifetime, I might say, of some of my hearers—our people, increasing to many millions, have filled the eastern valley of the Mississippi, adventurously ascended the Missouri to its headsprings, and are already engaged in establishing the blessings of self-government in valleys of which the rivers flow to the Pacific. The world beholds the peaceful triumphs of the industry of our emigrants. To us belongs the duty of protecting them adequately wherever they may be upon our soil. The jurisdiction of our laws and the benefits of our republican institutions should be extended over them in the distant regions which they have selected for their homes.

Source: Polk, James Knox. "Inaugural Address, Tuesday, March 4, 1845." In *United States Presidents' Inaugural Speeches: From Washington to George W. Bush*. Project Gutenberg, updated 2013. https://www.gutenberg.org/ebooks/925.

were American by birth. The course of the Texas Revolution, which to many Americans mirrored that of the American Revolution, further turned public opinion toward the Texian side. So did perceived abuses by the Mexican military, which again evoked the treatment of American colonists at the hands of the British redcoats. The slaughter of a

small Texas force at a mission church known as the Alamo inspired Americans' sympathy and hopes for the rebels. Though the Alamo was a military defeat, American press and popular culture turned it into a symbol of heroism and resistance. After nearly six months of fighting, and just weeks before General Santa Anna's capture at the Battle of San Jacinto, Texas formally declared itself an independent republic.

Mexico refused to recognize the Republic of Texas as an independent country. The United States, on the other hand, opened diplomatic dialogue with Texas, hosted Texas diplomats in Washington, D.C., and soon began talks of statehood. This U.S. alliance with a breakaway Mexican territory would prove to be a source of serious conflict with Mexico.

Efforts to annex Texas began in the early 1840s and spanned multiple U.S. presidencies. After Van Buren's term, William Henry Harrison was elected, but he died a month after taking office in 1841. His vice president, John Tyler, served the remainder of the 1841–45 term amid considerable controversy. This was the first time a president had died in office and thus the first test of the Constitution's provisions for presidential succession.

President John Tyler favored annexation and proposed a treaty, which the Senate refused to ratify. He then struck a compromise in which he agreed to drop out of the 1844 presidential race, in favor of Democratic leader James K. Polk, if Congress would pass its own joint resolution approving annexation. Congress passed the measure, and Tyler signed it on his final day in office, March 3, 1845. Texas accepted the United States' offer to join the Union—and Mexico recalled its diplomats and prepared for war.

The Mexican-American War

James K. Polk, who hawkishly supported aggressive expansionist policies, narrowly won the 1844 election, even with the endorsement of outgoing president John Tyler. The annexation of Texas and the related threat of a war with Mexico were among the most divisive political issues of the day; a vote for Polk was seen as a vote for annexation—and the war it would likely provoke.

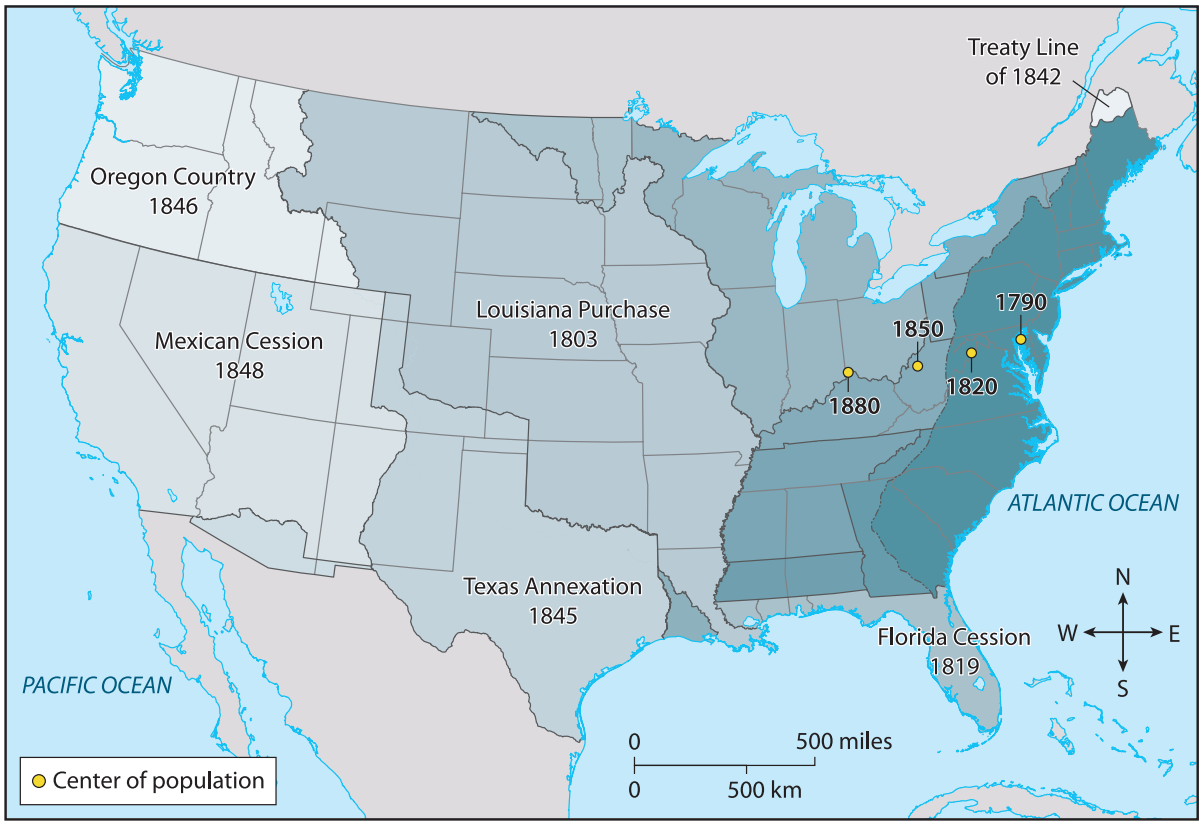
When he was inaugurated on March 4, 1845, Polk found Mexico continuing to dispute Texas's sovereignty while also challenging Texan and American claims about the new republic's borders. Texas claimed that its territory extended as far south as the Rio Grande, but Mexico claimed that the border lay farther north, at the Nueces River. Polk took the side of Texas. In the fall of 1845, he dispatched General Zachary Taylor to the disputed region with a force of more than three thousand troops. Meanwhile, he secretly offered to buy Texas

and lands westward as far as California. With popular opinion against such a sale and its own political system in turmoil, Mexico declined.

The following spring, Polk ordered a detachment of eighty troops southward to the Rio Grande. A much larger Mexican force responded, killing or wounding twenty-one Americans and capturing the rest. Polk used the incident as justification for asking Congress to declare war. On May 1, 1846, a declaration of war passed both houses by a wide margin.

In the meantime, Polk realized that it would be unfeasible to fight two simultaneous wars on two widely separated fronts. He therefore moved to resolve the status of the Oregon Country, which had been the subject of renewed disputes with the British since the Treaty of 1818. In the Treaty of Oregon, signed in June 1846, the United States and Britain agreed to extend the boundary between Oregon and Canada westward along the forty-ninth parallel. The United States gained sole control over what are now the states of Washington, Oregon, and Idaho, and the British claimed British Columbia without further dispute.

Center of American Population, 1790–1880



As the United States expanded and its people settled the western territories, the nation's center of population (the geographic point representing the average location of a region's population) moved westward as well.

The fighting of the Mexican-American War was a one-sided affair, as the United States invaded Mexico on multiple fronts from mid-1846 to September 1847. U.S. general Stephen W. Kearny first captured Nuevo México, a territory containing present-day New Mexico and parts of surrounding states, before leading the mass of his army west to California, where U.S.-backed rebels had been challenging the Mexican government since June 1846. By January 1847, both territories were under American control. In the meantime, an army led by Taylor struck at the Mexican heartland, winning an important victory at Buena Vista in February 1847. A third force, under General Winfield Scott, landed at Veracruz in March. After securing that port, Scott moved inland toward Mexico City over the next six months. His capture of the capital in September was the last major military action of the war.

The Treaty of Guadalupe Hidalgo, signed on February 2, 1848, ended the war on terms highly favorable to the United States, some of which are illustrated by the map on page 70. It stipulated that Mexico would cede Texas, along with much of the present-day Southwest, for $15 million. The Mexican cession, roughly 530,000 square miles (1.4 million sq km), constituted the northwestern third of Mexico's territory at the time and was about two-thirds the size of the Louisiana Purchase. The additions of Oregon and the Mexican cession gave the United States nearly the shape it has today. Most territory west of the Mississippi, however, was still unorganized, and its gradual division into states would be the subject of many more controversies.

Think Twice

How did the idea of manifest destiny influence U.S. expansion throughout the first half of the nineteenth century?

Topic 3
A Nation Divided and Reconstructed

Framing Question

What were the effects of the Civil War and Reconstruction on the United States?

Support for secession was widespread in South Carolina, and public meetings on the topic attracted large crowds in places like Charleston.

Leaving the Union

Setting the Scene

It is late November 1860—not quite four weeks since Abraham Lincoln was elected president of the United States. On the bustling streets of Charleston, South Carolina, banners and flags seem to hang from every window and storefront. Many are red, white, and blue, and several bear the state's familiar palmetto-tree emblem. On first looking at the scene, one might think for a moment that it is a celebration in honor of the new president.

However, a closer look at the banners shows that they are meant to protest *Lincoln, not to cheer him. The banners are a response to widespread fears that Lincoln's election might threaten the institution of slavery. Some of them contain mottos that invoke the language of states' rights against the federal government, such as one in French that reads "God and our rights." Another banner states, "The time for deliberation has passed—the time for action has come." Still another puts it even more plainly: "Stand to your arms." Charleston reflects the growing*

resolve throughout South Carolina and many of the surrounding Southern states, where preparations to voluntarily withdraw from the United States are underway. More than that, citizens are preparing for war, recruiting new men to join militias and raising funds to arm and supply them.

In the following weeks, the state's leaders assemble to formally declare their ***secession*** *from the Union. South Carolina is the first of eleven states that will do so. The language of its Declaration of Secession, published in December 1860, lays the blame on the "increasing hostility on the part of the non-slaveholding States to the institution of slavery." Northern states, the declaration goes on to say, refuse to capture and return those who escape from Southern slaveholders, as federal law now requires. Moreover, the newly elected president has made it clear, as he did two years earlier, that he believes the country cannot continue to remain "half slave and half free." To the secessionists in South Carolina, this means that Abraham Lincoln cannot be trusted to defend the rights of slaveholding states.*

Much of the declaration's wording resembles that of an earlier document, signed in 1776. Like the authors of the Declaration of Independence, South Carolina's leaders deem it proper to "declare," to the rest of the United States and the world, "the immediate causes" that led them to secede. They list the alleged abuses of power that they are protesting, claim a place for South Carolina "among the nations of the world," and appeal to God as the ultimate judge of their actions. Absent, however, is the claim that "all men are created equal"—a telling omission in a document devoted to defending slavery.

The Roots of Division: Slavery

By the middle of the nineteenth century, the transatlantic slave trade had gone on for more than three hundred years. The trade began around 1500 CE, when Spanish and Portuguese traders established coastal outposts in West Africa and began transporting enslaved laborers to plantations in the Caribbean. It grew dramatically during the seventeenth century alongside the rise of two major commercial crops: sugarcane in the Caribbean and tobacco in North America.

To work the sugar and tobacco plantations, European traders typically purchased prisoners from coastal African warlords and intermediaries, who participated in or sponsored raids into the interior. Captives were marched to the coast, bound together with ropes and chains. In some cases, these raids devastated entire villages, capturing large numbers of working-age individuals.

Those who survived this journey were then shipped across the Atlantic in cramped and unsanitary conditions. This phase was known as the Middle Passage of a triangular trade network, so called because it came after the passage of goods from Europe to Africa—where those goods were traded for enslaved people—and before the passage of goods from the Americas to Europe. About one-fifth of those transported on this voyage died en route. Captives were bound and kept belowdecks in the dark. There were no toilets and minimal food and water, leading to rampant disease as well as malnutrition and dehydration.

Once on land, the enslaved people stood at auction, enduring much the same treatment as livestock. Families were separated as a matter of course. Those deemed fit for labor were marched off, at the point of a gun and under the threat of the lash, to toil in the fields or serve in private households. Enslavers held near-absolute power over the people they considered their property, controlling what they wore and ate and where (if at all) they could travel. Activities that free people today take for granted, such as reading, were forbidden by slaveholders, sometimes with the force of state or local law.

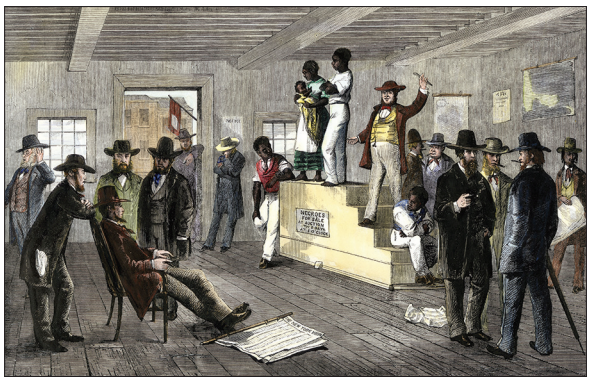
Enslaved persons who worked on farms commonly suffered severe cruelty, including whippings and torture, as overseers tried to extract the maximum amount of backbreaking labor. Cooks, maids, and others who worked inside a home, as well as those who worked in businesses and factories, generally faced less strenuous tasks and less harsh punishments. Yet the work was still endless, exhausting, and done entirely for the benefit of someone else without compensation. Regardless of placement, the enslaved endured severe mental anguish from constant surveillance, unpredictable outbursts of violence at the hands of the enslavers, and the ever-present threat of being sold, separated from loved ones, or worse.

The Plantation System

Plantation agriculture was closely linked to the institution of slavery in the American South and elsewhere. The South's mild climate, generous rainfall, and fertile soil encouraged the large-scale cultivation of cash crops such as cotton and tobacco. These were crops that planters grew not to consume as food or feed to livestock but to sell for a profit. Both required significant labor not only to plant and harvest but also to process into a form appropriate for bringing to market. Tobacco leaves had to be cut and cured (dried and aged) over a period of weeks. Cotton fiber, about which you will read more soon, had to be carefully separated from its seeds.

This same system prevailed in the West Indies (a collective name for the islands of the Caribbean), where European powers established sugarcane plantations and trafficked in enslaved workers to operate them. (Sugarcane was a key ingredient in the production of alcohol, a major export.) Spanish missions in the Americas likewise relied on forced labor for domestic and agricultural work.

The limited presence of slavery in the northern United States reflected not necessarily a cultural opposition to the practice—though some groups, such as the Quakers, were indeed strongly opposed to it—but a different social and economic organization. The climate and soil of the North made it more economical to manage smaller farmsteads with relatively few workers. While slavery was gradually abolished in Northern states before and after the American Revolution, it persisted in some areas into the early 1800s. Compared to the South, the more rapid pace of industrialization and the influx of European immigrant workers further limited the role of slavery in the Northern economy.



Although the foreign slave trade was outlawed in 1808, the domestic slave trade continued for nearly sixty years. By the time of abolition, the majority of people enslaved in the United States were American-born.

Sometimes, enslaved people revolted against the conditions that had been forced upon them. In January 1811, the German Coast Uprising—the largest such revolt in American history—took place northwest of New Orleans. Up to five hundred people rose up against their enslavers, killing two people in the process, and marched toward New Orleans before being stopped by a deadly force of soldiers and militia. Those who survived the encounter were condemned to

death by beheading. Because Louisiana was in the process of transitioning from territory to state at the time, territorial officials sought to downplay news of the uprising, fearing that reports of such unrest might cast doubt on the region's readiness for statehood.

Twenty years later, in August 1831, enslaved preacher Nat Turner led a deadly rebellion in Virginia. In his later testimony, published posthumously as *The Confessions of Nat Turner* and based on interviews conducted while he was in jail, he claimed that he had been religiously inspired to overthrow the unjust system of slavery. In Turner's rebellion, as on the German Coast, soldiers, militia members, and vigilantes ultimately slew dozens of suspected rebels and bystanders without trial; dozens more, including Turner himself, were condemned to death. Backed by the military, local leadership, and the force of law, slaveholders quickly suppressed these rebellions. The numerous smaller revolts and acts of sabotage throughout the South were dealt with equally harshly, often as a warning to others who might be similarly inclined. Those deemed responsible often suffered gruesome punishments at the hands of their captors.

Nat Turner's revolt, and his ultimate capture and execution, made him a hero in the eyes of abolitionists. Proslavery sources instead described him as a dangerous insurrectionist.

Think Twice

What overwhelming obstacles did enslaved people face if they chose to revolt against those who oppressed them?

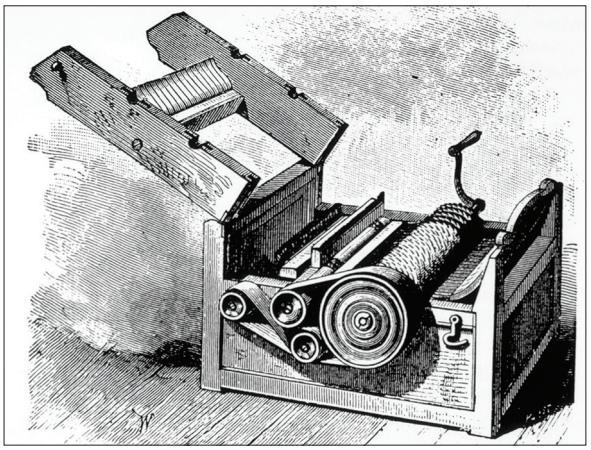
Economic Role of Slavery

Neither the practice nor the effects of slavery were confined to the American South. Indeed, one reason this inhumane practice persisted so long was that large sectors of the American economy benefited from enslaved—and, obviously, unpaid—labor. In addition to tobacco, the rising cotton industry produced a valuable, easily exported crop that was highly labor-intensive to harvest and process. Eli Whitney's invention of the cotton gin in 1793 simplified the processing. This device could mechanically separate cotton fiber from its seeds, saving a great deal of labor. Prior to Whitney's invention, cleaning cotton was the most time-consuming and detailed step of the whole process, taking up to ten hours of human labor per pound. The gin sped this process up drastically: Two people operating one machine could clean five pounds of cotton per hour.

Although they did not pay their workers, slaveholders calculated the costs of feeding, clothing, and lodging enslaved people in purely economic terms, measuring expenses against the labor they could extract from them. With Whitney's invention, processing cotton became far more efficient. Less labor was required to produce a pound of raw cotton, making plantations more profitable.

Increased profits encouraged planters to grow more cotton. Rather than reducing plantation owners' reliance on enslaved labor, paradoxically, the cotton gin encouraged them to use *more* enslaved labor for planting and picking cotton. The domestic slave trade expanded to meet the growth of the plantations it supplied. The enslaved population in the United States more than quadrupled, from about seven hundred thousand to more than three million, in the sixty years following the introduction of the cotton gin.

As you read earlier, the plantation system was predominantly a Southern institution. However, the economy of the industrial North also benefited from slavery. The raw cotton and indigo used by the immensely profitable Northern textile industry were mainly produced by enslaved workers. So was the molasses that made its way north from the Caribbean before being distilled into rum. Moreover, the supplies used to operate the plantations—lumber,



The cotton gin (short for *cotton engine*) combed out cotton seeds from the fiber by passing the cotton bolls through a series of revolving brushes and fine screens.

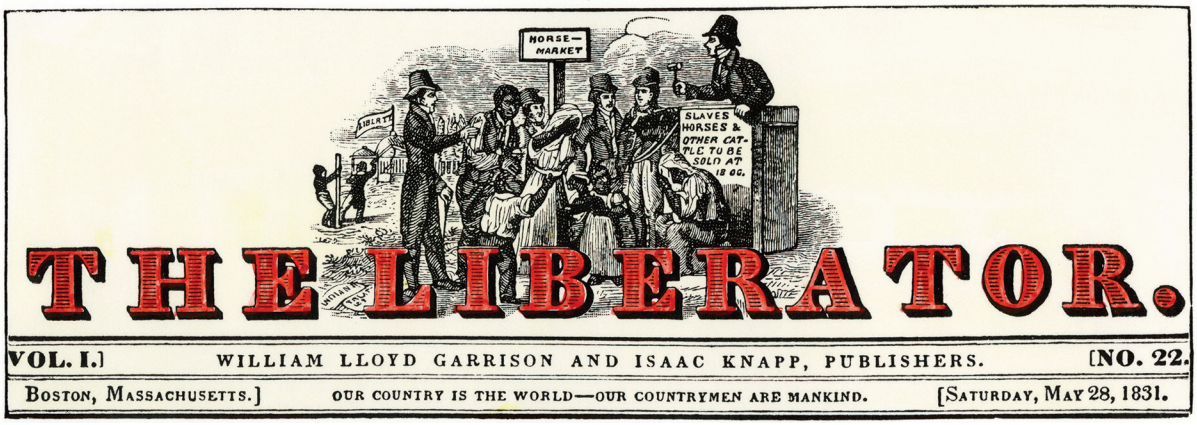
candles, foodstuffs, and so forth—often originated from Northern manufacturers or traders. As you read in an earlier topic, the states of the North preceded the South in officially abolishing slavery. Yet *all* sectors of the national economy remained deeply connected to this unjust system.

Think Twice

What role did cotton and other cash crops play in the growth of slavery in the United States?

Abolitionist Efforts

From the first days of the American colonies, many people understood slavery—and its inhumanity—to be fundamentally out of keeping with a democratic society. Yet since the country's founding, the leaders of the United States deferred and compromised on the



***The Liberator*, William Lloyd Garrison's abolitionist newspaper, presented the end of slavery as a worldwide cause and a moral imperative.**

issue of slavery, even as many of them acknowledged its evils. Recall from Topic 1 that the Constitution contained one such compromise, allowing states to count three-fifths of their enslaved population for the purposes of allocating seats in Congress.

By the 1830s, formal antislavery organizations had arisen and begun petitioning Congress en masse for an end to slavery. An official American Anti-Slavery Society was founded in 1833. Often, the same activists who protested for women's rights were also active in the abolitionist cause. Elizabeth Cady Stanton, a friend and associate of active American Anti-Slavery Society member Lucretia Mott, helped Mott organize the first women's rights convention in 1848. At the convention—which was held in Seneca Falls, New York, as you will read in Unit 2—the attendees heard an address from Frederick Douglass, who voiced his support for women's suffrage.

The abolitionist movement was also aided by popular media. Beginning in 1831, the Boston journalist and prominent abolitionist William Lloyd Garrison published a newspaper called *The Liberator* that included antislavery literature and reporting.

Some influential abolitionists were people who had escaped slavery themselves. Sojourner Truth was born in New York before that state's gradual abolition laws took effect. Truth campaigned for women's rights and African American civil rights, two causes she saw as inseparable. Her self-chosen name reflected a religious awakening she experienced in the early 1840s, which prompted her to "sojourn" (travel) in order to spread the message of abolitionism. Truth is best known for an 1851 speech she made at a women's rights convention in Akron, Ohio. There, she argued that African American women had the same needs, wants, and potential as any other woman in the United States, and therefore should have the same

Abolitionist Sojourner Truth (c. 1797–1883) famously insisted on the connection between the principles of racial and gender equality.

rights. Though no formal copy of the address survives, Truth's rhetorical question—"Ain't I a woman?"—has become an unofficial title of the speech.

Frederick Douglass was born enslaved in Maryland before fleeing northward to freedom in 1838 as a young adult. Like Sojourner Truth, Douglass drew on his firsthand experience of slavery and used his skills as an orator to rally support for his cause and challenge prejudices about racial inequality. His 1845 autobiography, *Narrative of the Life of Frederick Douglass*, described the cruelty he experienced at the hands of enslavers and the value that education held for him in seeking his freedom. The book and a subsequent 1855 volume entitled *My Bondage and My Freedom* sold widely and inspired support for the abolitionist cause.

In 1850, a federal act outraged many Northerners even more, for different—if related—reasons. For decades, enslaved people in the South had sought their freedom by escaping to free states in the North. There, slavery was no longer practiced. However, African Americans still frequently experienced discrimination and economic and social oppression. The Fugitive Slave Act of 1850 required the capture and return of enslaved people who had escaped to free states, thereby compelling Northerners to participate in the enforcement of slavery and the continued oppression of those seeking freedom.

In 1852, author Harriet Beecher Stowe published a book that increased awareness of the brutal reality of slavery and sharpened opposition to the 1850 law. Her novel *Uncle Tom's Cabin*, more than any other, has been credited with spreading antislavery sentiment and rallying the abolitionist cause. This novel portrayed the plight of enslaved people in the South, including the extreme cruelty and violence they endured. Through its narrative and dialogue, the book shared the serious moral concerns that many Northerners had about the Fugitive Slave Act. Widely reviled in the South, it became a bestseller in the

Harriet Beecher Stowe (1811–96) galvanized antislavery sentiment with her novel *Uncle Tom's Cabin*, which became a bestseller in multiple languages. In response, some Southern authors wrote "anti-Tom novels" that romanticized plantation life.

United States and Great Britain; the only book that sold more copies at the time was the Bible. So great was the novel's impact that when Abraham Lincoln met Stowe in 1862, he supposedly called her "the little woman who wrote the book that made this great war."

As the abolitionist movement grew bolder and more vocal in the North, it fed into **sectionalism** and a wider debate about states' rights. Southern states had long claimed that each state had the right to determine how it managed slavery. However, Northern states argued that the Fugitive Slave Act violated their own laws and impaired their ability to oppose slavery. Resistance to the law was strong in the North. Local officials often refused to cooperate with the law, and many Northern states passed personal liberty laws to resist its enforcement. Courtroom battles, rescues of "fugitives" by local groups, and the refusal of Northern law enforcement to act convinced Southern leaders that the federal government wished to decide the fate of slavery as a national rather than a state issue. The federal government's ability to maintain unity between the two regions was soon severely tested.

Think Twice

Describe two methods or arguments abolitionists used to convince others of the injustices of slavery.

Sectionalism and the Road to War

In March 1836, Senator John C. Calhoun from South Carolina proposed that the Senate prohibit the debate of antislavery petitions. His aim was to preserve slavery. However, Calhoun's proslavery colleagues worried that his measure would make it appear as though abolitionists were being denied their constitutional right "to petition the Government for a redress of grievances." They feared, in other words, that if they

PRIMARY SOURCE: *UNCLE TOM'S CABIN*, HARRIET BEECHER STOWE, 1852

In this passage, an Ohio state senator and his wife debate the Fugitive Slave Act and Christianity's relationship to slavery.

"There has been a law passed forbidding people to help off the slaves that come over from Kentucky, my dear; so much of that thing has been done by these reckless Abolitionists, that our brethren in Kentucky are very strongly excited, and it seems necessary, and no more than Christian and kind, that something should be done by our state to quiet the excitement."

"And what is the law? It don't forbid us to shelter these poor creatures a night, does it, and to give 'em something comfortable to eat, and a few old clothes, and send them quietly about their business?"

"Why, yes, my dear; that would be aiding and abetting, you know." . . .

"Now, John, I want to know if you think such a law as that is right and Christian?"

"You won't shoot me, now, Mary, if I say I do!"

"I never could have thought it of you, John; you did n't vote for it?"

"Even so, my fair politician."

"You ought to be ashamed, John! Poor, homeless, houseless creatures! It's a shameful, wicked, abominable law, and I'll break it, for one, the first time I get a chance; and I hope I *shall* have a chance, I do! Things have got to a pretty pass, if a woman can't give a warm supper and a bed to poor, starving creatures, just because they are slaves, and have been abused and oppressed all their lives, poor things!"

"But, Mary, just listen to me. Your feelings are all quite right, dear, and interesting, and I love you for them; but, then, dear, we must n't suffer our feelings to run away with our judgment; you must consider it's not a matter of private feeling,—there are great public interests involved,—there is such a state of public agitation rising, that we must put aside our private feelings."

"Now, John, I don't know anything about politics, but I can read my Bible; and there I see that I must feed the hungry, clothe the naked, and comfort the desolate; and that Bible I mean to follow."

"But in cases where your doing so would involve a great public evil—"

"Obeying God never brings on public evils. I know it can't. It's always safest, all round, to *do as He* bids us."

Source: Stowe, Harriet Beecher. *Uncle Tom's Cabin; or, Life Among the Lowly*. Vol. 1. Boston: John P. Jewett, 1852, pp. 119–121.

refused to take up issues that the American public was formally asking them to debate, Congress would seem to be neglecting its duty under the Constitution. So they devised an alternative; their proposal allowed the petitions but barred any voting on them. The measure passed, due in large part to the desire of Northern senators—many of whom remained opposed to slavery—to reduce tension and keep the Senate functioning. A similar measure for silencing debate about petitions related to slavery passed in the House as well. There, the balance of power already heavily favored slave states.

However, keeping the balance between the slave and free states became yet more difficult following the Mexican-American War, which concluded with the signing of the Treaty of Guadalupe Hidalgo in 1848. While the vast southwestern territories acquired from Mexico brought new conflicts and new occasions for compromise, they also brought cultural and economic tensions, especially over whether slavery would be permitted in the new territories.

The Compromise of 1850, enacted by Congress under President Millard Fillmore, was another such attempt. This set of laws sought to resolve, or at least defer, the question of the practice of slavery in the territories that the United States acquired at the conclusion of the Mexican-American War. Without determining the fate of the entire Southwest, Henry Clay brokered a compromise in which California would join the Union as a free state, while the slave trade would be banned in Washington, D.C. In addition, the Compromise included passage of the Fugitive Slave Act, which you read about earlier. This law required that even in free states, law enforcement officers and private citizens must assist in identifying and capturing persons who had escaped from slavery so they could be returned to their slaveholders.

By the mid-1850s, however, sectional tensions between North and South had grown too severe to ignore. As the railroads extended westward and the western territories grew more populous, those territories became the latest flashpoint in the slavery debate. Illinois congressman Stephen Douglas called for the territories to be organized "with or without slavery, as their constitutions may prescribe," and his Southern colleagues seized the chance to repeal the Missouri Compromise altogether. Northern legislators and abolitionist spokespeople objected to this revocation of what, to them, had been a boundary on the practice of slavery.

After vigorous debate, Douglas's law passed in 1854 as the Kansas–Nebraska Act. As he had urged, it called for the voters of the territory of Kansas, not the U.S. Congress, to decide on the question of slavery for a future Kansas state. Even within Kansas, however, this proved a deeply divisive question. Proslavery and

The 1938 mural *The Tragic Prelude* portrays the events of Bleeding Kansas as an overture to the American Civil War. None at the time could have known that a nationwide conflict was just a few years away, but historians have often seen one episode as leading to the other.

antislavery groups of settlers faced off in a yearslong conflict—in effect, a small-scale civil war—known as Bleeding Kansas. A radical abolitionist named John Brown led a detachment of antislavery volunteers to kill proslavery settlers in the Pottawatomie (/pah*teh*wat*teh*mee/) Massacre of 1856. He proceeded to lead free-state advocates in several skirmishes against both proslavery militias and government forces, losing one of his sons in the Battle of Osawatomie (/oh*suh*wah*teh*mee/). Brown's actions in 1856 eventually prompted the intervention of U.S. Marshals and made him a federal fugitive, but he escaped arrest and made his way east, staying with friends and sympathizers.

Kansas itself was ultimately admitted as a free state in 1861, not because the fighting stopped but because the secession of Southern states left Congress with an antislavery majority, making free-state admission possible.

Think Twice

How did Bleeding Kansas reflect growing sectionalism?

The *Dred Scott* Decision

Soon, the already teetering sectional balance was again challenged, this time by actions of the judicial branch. In 1857, a notorious Supreme Court decision

PRIMARY SOURCE: *DRED SCOTT v. SANDFORD*, 1857

The Dred Scott *decision caused significant divide and sectionalism in the United States. The following excerpt comes from the majority opinion by Chief Justice Roger B. Taney.*

Upon a full and careful consideration of the subject, the court is of opinion, that, upon the facts stated in the plea in abatement, Dred Scott was not a citizen of Missouri within the meaning of the Constitution of the United States, and not entitled as such to sue in its courts. . . .

The act of Congress, upon which the plaintiff relies, declares that slavery and involuntary servitude, except as a punishment for crime, shall be forever prohibited in all that part of the territory ceded by France, under the name of Louisiana, which lies north of thirty-six degrees thirty minutes north latitude, and not included within the limits of Missouri. And the difficulty which meets us at the threshold of this part of the inquiry is, whether Congress was authorized to pass this law under any of the powers granted to it by the Constitution; for if the authority is not given by that instrument, it is the duty of this court to declare it void and inoperative, and incapable of conferring freedom upon any one who is held as a slave under the laws of any one of the States. . . .

. . . The power of Congress over the person or property of a citizen can never be a mere discretionary power under our Constitution and form of Government. The powers of the Government and the rights and privileges of the citizen are regulated and plainly defined by the Constitution itself. . . .

Upon these considerations, it is the opinion of the court that the act of Congress which prohibited a citizen from holding and owning property of this kind in the territory of the United States north of the line therein mentioned, is not warranted by the Constitution, and is therefore void; and that neither Dred Scott himself, nor any of his family, were made free by being carried into this territory; even if they had been carried there by the owner, with the intention of becoming a permanent resident.

Source: Dred Scott v. Sandford. 60 U.S. 393 (1856).

inflamed the sectional controversy by angering abolitionists and threatening past compromises. The case of *Dred Scott v. Sandford* concerned an enslaved man, Dred Scott, who had at various times traveled with his enslaver to the free state of Illinois and the free territory of Wisconsin. (Wisconsin had been organized in 1836 and was eventually admitted as a free state in 1848, before the Missouri Compromise was overturned.) Scott and his lawyers argued that because Scott had been at times a resident in jurisdictions where slavery was prohibited, he should now be considered a free person.

After more than a decade of litigation, the case made its way to the U.S. Supreme Court. Chief Justice Roger B. Taney and six associate justices rendered a majority opinion (7–2) with sweeping significance. The court held that under the law of the United States, enslaved persons were considered property. Per Taney's written opinion, neither Scott nor any other African American, whether enslaved or free, could be considered a citizen of the United States. Furthermore, according to the court, not only did Dred Scott have no right to his freedom, he lacked the legal ability to sue in the first place. That finding would have been enough to extinguish Scott's lawsuit, but the majority of justices went even further: They ruled that the Missouri Compromise was unconstitutional because it deprived

In suing for his freedom, Dred Scott raised national questions about the citizenship status of both enslaved and free African Americans.

slaveholders of their fundamental right to property. (Two justices dissented from this part of the decision because they believed it exceeded the court's authority.)

In rendering this blanket decision, Taney hoped to reduce the tensions feeding the growing nationwide conflict over slavery. Instead, his decision did the opposite. Northerners understood that if the *Dred Scott* decision became the law of the land, slavery would be the **de facto** norm across the entire United States, regardless of any state laws or past agreements.

Controversial in its time, the *Dred Scott* decision is almost universally condemned today. It is often described as one of the worst decisions ever rendered by the Supreme Court. A twentieth-century chief justice, Charles Evans Hughes, called it the court's "greatest self-inflicted wound" in recognition of the harm that it did to both the court's reputation and the country at large.

Think Twice

How did legislative and legal decisions made in the mid-1800s contribute to rising sectionalism?

Radical Abolitionism and the Path to War

As abolitionists grew in number, the tactics of some became more violent. In 1859, an episode of bloodshed captivated the country and convinced many on both sides that war was now inevitable.

After fighting proslavery settlers in Bleeding Kansas, John Brown had begun planning how he could draw more attention to the abolitionist cause. Beginning on October 16, 1859, he led a raid on the U.S. Army arsenal at Harpers Ferry, Virginia (present-day West Virginia). He hoped that seizing this military base, along with the weapons it contained, would spark a widespread uprising of enslaved people across the South. Brown's forces captured the arsenal but were quickly surrounded by local militia and then the U.S. Marines, led by Robert E. Lee. Half of Brown's party died in the subsequent fighting. Brown and other surviving raiders were captured, tried, convicted of treason against the state of Virginia, and sentenced to death. Although the wider uprising Brown envisioned never came to pass, news of his actions deepened sectionalism and distrust.

The story of John Brown's raid on Harpers Ferry soon became national news. Brown, who raided a federal arsenal and took prisoners in the process, was portrayed as a hero or a terrorist, depending on who did the telling. Two of Brown's sons died as a result of injuries suffered during the raid.

As news of the raid on Harpers Ferry spread, some abolitionists praised Brown for his actions. The abolitionist minister Henry Ward Beecher praised Brown's motives while deploring his violent methods, reportedly saying, "His soul was noble, his work miserable."

Meanwhile, Brown was viewed as a radical terrorist in the South. To supporters of slavery, the John Brown episode proved that peace between North and South could not exist for long. A *Charleston Mercury* editorial in October 1859 deemed the raid "a warning profoundly symptomatic of the future of the Union with our sectional enemies." By the following month, the same newspaper was even more emphatic: "The South must control her own destinies or perish."

Think Twice

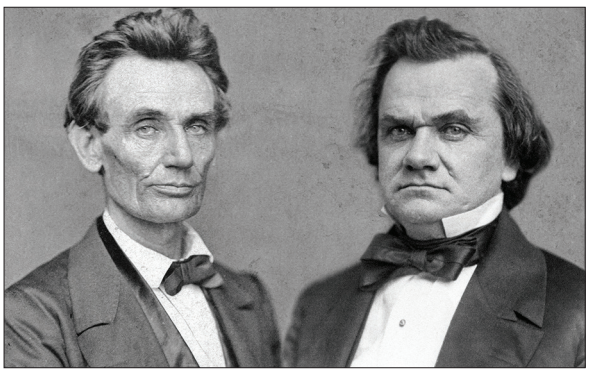
What was the significance of the events at Harpers Ferry?

The Election of 1860

Amid the deepening sectional feud, an Illinois congressman named Abraham Lincoln rose to prominence as a spokesperson for a strong federal government and a united country. The lawyer's reputation for fair dealing and principled argument earned him the nickname "Honest Abe." At the same time, Lincoln built a regional reputation as an orator and a writer, often speaking out against the expansion of slavery into new territories, though he did not call for immediate abolition in the South.

Lincoln first attracted national attention when, while campaigning in 1858 to represent Illinois in the U.S. Senate, he likened the nation to the biblical image of a "house divided against itself [that] cannot stand." Lincoln was not, at that time, in favor of eliminating slavery in the South, but he strongly opposed its spread into the territories and future states. In his speech, he asserted that slavery would either become a nationwide practice or be abolished nationwide.

Lincoln's opponent in the Senate race was Stephen A. Douglas, the incumbent senator and architect of the Kansas–Nebraska Act, who believed that the country could and must survive despite different policies on slavery. Lincoln lost the race, and Douglas retained his Senate seat. Two years later, Democrat Douglas and Republican Lincoln faced off again. This time, they were contesting the



Abraham Lincoln and his political opponent, Stephen A. Douglas, repeatedly debated the issue of slavery during their 1858 U.S. Senate campaigns.

PRIMARY SOURCE: "HOUSE DIVIDED" SPEECH, ABRAHAM LINCOLN, 1858

Abraham Lincoln's "House Divided" speech was delivered on June 16, 1858, at the Illinois Republican State Convention. One day earlier, he had been chosen as the Republican candidate for the upcoming Senate race, in which he would run against Stephen A. Douglas. Lincoln strongly disagreed with Douglas's belief that the decision of how far slavery could extend across the United States should be left to the people living in those regions and not the federal government. His speech addressed the divisive issues, such as slavery, that he felt were tearing the country apart.

If we could first know where we are, and whither we are tending, we could then better judge what to do, and how to do it. We are now far into the fifth year, since a policy was initiated, with the avowed object, and confident promise, of putting an end to slavery agitation.

Under the operation of that policy, that agitation has not only, not ceased, but has constantly augmented. In my opinion, it will not cease, until a crisis shall have been reached, and passed—

"A house divided against itself cannot stand."

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

Either the opponents of slavery, will arrest the further spread of it, and place it where the public mind shall rest in the belief that it is in course of ultimate extinction; or its advocates will push it forward, till it shall become alike lawful in all the States, old as well as new—North as well as South.

Source: Lincoln, Abraham. "Speech of Hon. Abraham Lincoln." *Illinois State Journal*, June 18, 1858, p. 2.

presidency, along with John Breckinridge of the Southern Democratic Party and John Bell of the Constitutional Union Party. Lincoln won the 1860 presidential election with the votes of eighteen Northern states where slavery was prohibited; he won zero electoral votes in the four border states where slavery was legal. In ten Southern states, he did not even appear on the ballot.

Think Twice

Why did Lincoln believe that compromises between free states and slave states were doomed to fail?

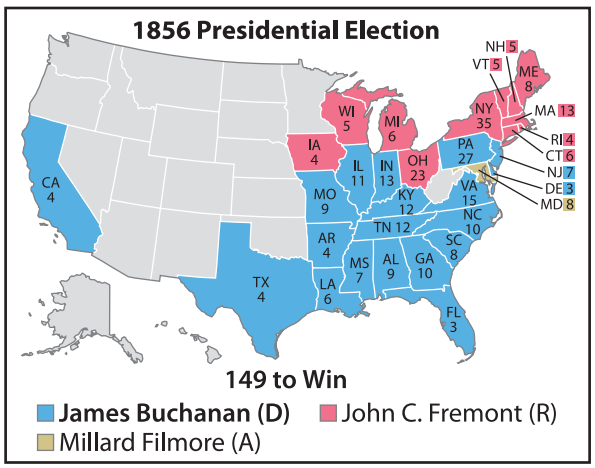
Secession

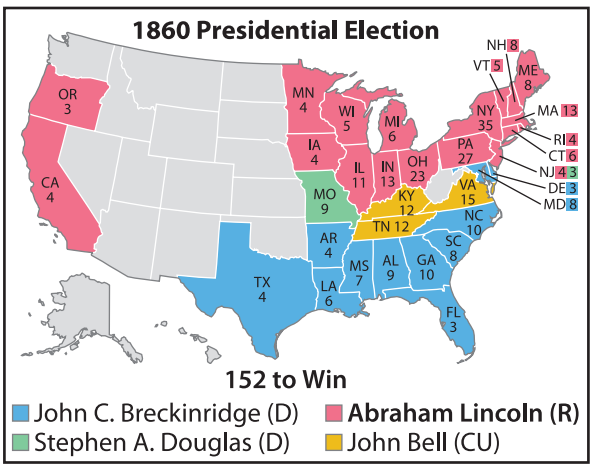
The election of Lincoln, without a single Southern electoral vote, prompted the secession of the Southern states by confirming for many the belief that the federal government would continue to restrict slavery ever more tightly. There had been threats of secession throughout the early and mid-nineteenth century, often coinciding with the admission of new free states or the threat of a federal ban on slavery in the territories. In the past, those calling for their states to secede had ultimately been calmed by compromises like that of 1850. The 1860 election, however, moved the nation beyond compromises.

As you read at the beginning of this topic, South Carolina was the first of what would become eleven states to leave the Union, seceding in December 1860. Between January 9 and February 1, 1861, six more states—Mississippi, Florida, Alabama, Georgia, Louisiana, and Texas—followed suit, bringing the total of seceded states to seven. In their declarations of secession, several of these states decried what they believed to be the unconstitutional interference of Northern states, via the federal government, with their right to protect slavery. On February 8, 1861, the seven secessionist states formed the Confederate States of America, also known as the Confederacy.

The Civil War

Lincoln's main goal in responding to this crisis was to preserve the Union. He understood from the Constitution that the states had an agreement to be united that could not be unilaterally broken. He believed, too, that the practice of slavery, if contained and prevented





In the 1860 election, several states that had leaned Democratic in 1856 swung to support the Republican Lincoln. Facing two challengers who were Democrats and one from the short-lived Constitutional Union Party, Lincoln won a majority of the electoral votes (180). He also won a plurality of the popular vote, or more votes than any other candidate, with 1,865,908 votes.

PRIMARY SOURCE: FIRST INAUGURAL ADDRESS, ABRAHAM LINCOLN, 1861

Abraham Lincoln delivered his first inaugural address on Monday, March 4, 1861, as he began his first term in office as the sixteenth president of the United States. The speech was mainly addressed to the people of the South, where seven states had already seceded from the Union.

One section of our country believes slavery is right, and ought to be extended, while the other believes it is wrong, and ought not to be extended. This is the only substantial dispute. The fugitive-slave clause of the Constitution, and the law for the suppression of the foreign slave-trade, are each as well enforced, perhaps, as any law can ever be in a community where the moral sense of the people imperfectly supports the law itself. The great body of the people abide by the dry legal obligation in both cases, and a few break over in each. This, I think, cannot be perfectly cured; and it would be worse in both cases after the separation of the sections than before. The foreign slave-trade, now imperfectly suppressed, would be ultimately revived, without restriction, in one section, while fugitive slaves, now only partially surrendered, would not be surrendered at all by the other.

Physically speaking, we cannot separate. We cannot remove our respective sections from each other, nor build an impassable wall between them. A husband and wife may be divorced, and go out of the presence and beyond the reach of each other; but the different parts of our country cannot do this. . . .

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

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

Source: Lincoln, Abraham. First inaugural address. March 4, 1861. Famous Presidential Speeches. Miller Center, University of Virginia. https://millercenter.org/the-presidency/presidential-speeches/march-4-1861-first-inaugural-address.

from expanding, would ultimately die out if the Union were kept together, paving the way for a future of freedom for all. This is one reason why, throughout the war, Lincoln would make significant compromises to keep the border states—Delaware, Maryland, Kentucky, Missouri, and later, West Virginia—from leaving the Union, even though all permitted the practice of slavery.

In his inaugural address of March 4, 1861, Lincoln did not call for immediate abolition. Instead, he urged reconciliation between the North and South, saying that slavery was "the only substantial dispute" among the states. He argued that the secession of the Southern states would actually make the slavery problem *worse* for both sides. Southern slaveholders would suffer because the North would stop enforcing the Fugitive Slave Act altogether. Northern abolitionists would be horrified when the South revived the international slave trade, which Congress had banned in 1808.

Alexander Stephens, the vice president of the Confederacy, presented a rebuttal in a speech made two weeks later. In what is now known as the Cornerstone Speech, Stephens praised the Confederacy for having accomplished its "revolution . . . without the loss of a single drop of blood." He defended the new Confederate government as founded upon a "great truth" of **inherent** racial inequality and insisted that slavery as practiced in the South was justified because it was the "subordination" of an inferior race to a superior one. He dismissed those in the North who professed racial equality as "fanatics."

In the months following secession, leaders of Southern states, and later of the Confederacy,

The Confederate bombardment and capture of Fort Sumter lasted thirty-four hours. Despite Anderson ultimately surrendering the fort, his brave efforts to maintain control of it meant he returned to New York as an early hero of the American Civil War.

PRIMARY SOURCE: CORNERSTONE SPEECH, ALEXANDER STEPHENS, 1861

The new Constitution has put at rest forever all the agitating questions relating to our peculiar institutions—African slavery as it exists among us—the proper status of the negro in our form of civilization. This was the immediate cause of the late rupture and present revolution. Jefferson, in his forecast, had anticipated this, as the "rock upon which the old Union would split." He was right. What was conjecture with him, is now a realized fact. But whether he fully comprehended the great truth upon which that rock stood and stands, may be doubted. The prevailing ideas entertained by him and most of the leading statesmen at the time of the formation of the old Constitution were, that the enslavement of the African was in violation of the laws of nature; that it was wrong in principle, socially, morally and politically. It was an evil they knew not well how to deal with; but the general opinion of the men of that day was, that, somehow or other, in the order of Providence, the institution would be evanescent [fleeting] and pass away. This idea, though not incorporated in the Constitution, was the prevailing idea at the time. The Constitution, it is true, secured every essential guarantee to the institution while it should last, and hence no argument can be justly used against the constitutional guarantees thus secured, because of the common sentiment of the day. Those ideas, however, were fundamentally wrong. They rested upon the assumption of the equality of races. This was an error. It was a sandy foundation, and the idea of a Government built upon it—when the "storm came and the wind blew, it fell." . . .

The great objects of humanity are best attained, when conformed to his laws and degrees, in the formation of Governments as well as in all things else. Our Confederacy is founded upon principles in strict conformity with these laws. This stone which was rejected by the first builders "is become the chief stone of the corner" in our new edifice.

Source: Stephens, Alexander. "A. H. Stephens' Speech on the 'Corner Stone.'" In *The Rebellion Record: A Diary of American Events, with Documents, Narratives, Illustrative Incidents, Poetry, Etc.*, edited by Frank Moore. Vol. 1. New York: G. P. Putnam, 1862, pt. 2, pp. 45–46.

called for U.S. troops to abandon their forts and bases in the South. Those stationed at Fort Sumter, near Charleston, South Carolina, refused to do so. On April 11, 1861, with fresh supplies due to arrive at the fort, Confederate forces led by Louisiana general P. G. T. Beauregard made a final demand for surrender. They opened fire the next day and

proceeded to bombard Fort Sumter for thirty-four hours. The fort was designed to defend against naval, not land, bombardment, and commanding officer Robert Anderson was forced to surrender on April 13. Though no combatants died before the evacuation of Fort Sumter, the battle marked the beginning of the Civil War.

Within two days, President Lincoln issued a call for volunteers to form a temporary Union militia of seventy-five thousand troops. These would supplement the United States Army, which at the time of the war's beginning had just over fifteen thousand troops. In response, Virginia, Arkansas, Tennessee, and North Carolina seceded and joined the Confederacy, bringing the total number of Confederate states to eleven. Like their Union counterparts, Confederate leaders initially called for volunteers to fight on behalf of their breakaway republic.

The reliance on volunteer militia reveals the optimism both sides initially had about their prospects in the war. Many in both the North and the South believed the conflict would be over in as little as three months and would be decided in a single major battle. Therefore, they felt, there would be no need to raise a standing army or resort to **conscription**, also known as the draft. In actuality, the war dragged on for nearly four years, claiming the lives of more than half a million soldiers and many civilians—an estimated 2 percent of the U.S. population at the time.

Think Twice

Describe the initial goals of the Union and the Confederacy at the beginning of the Civil War.

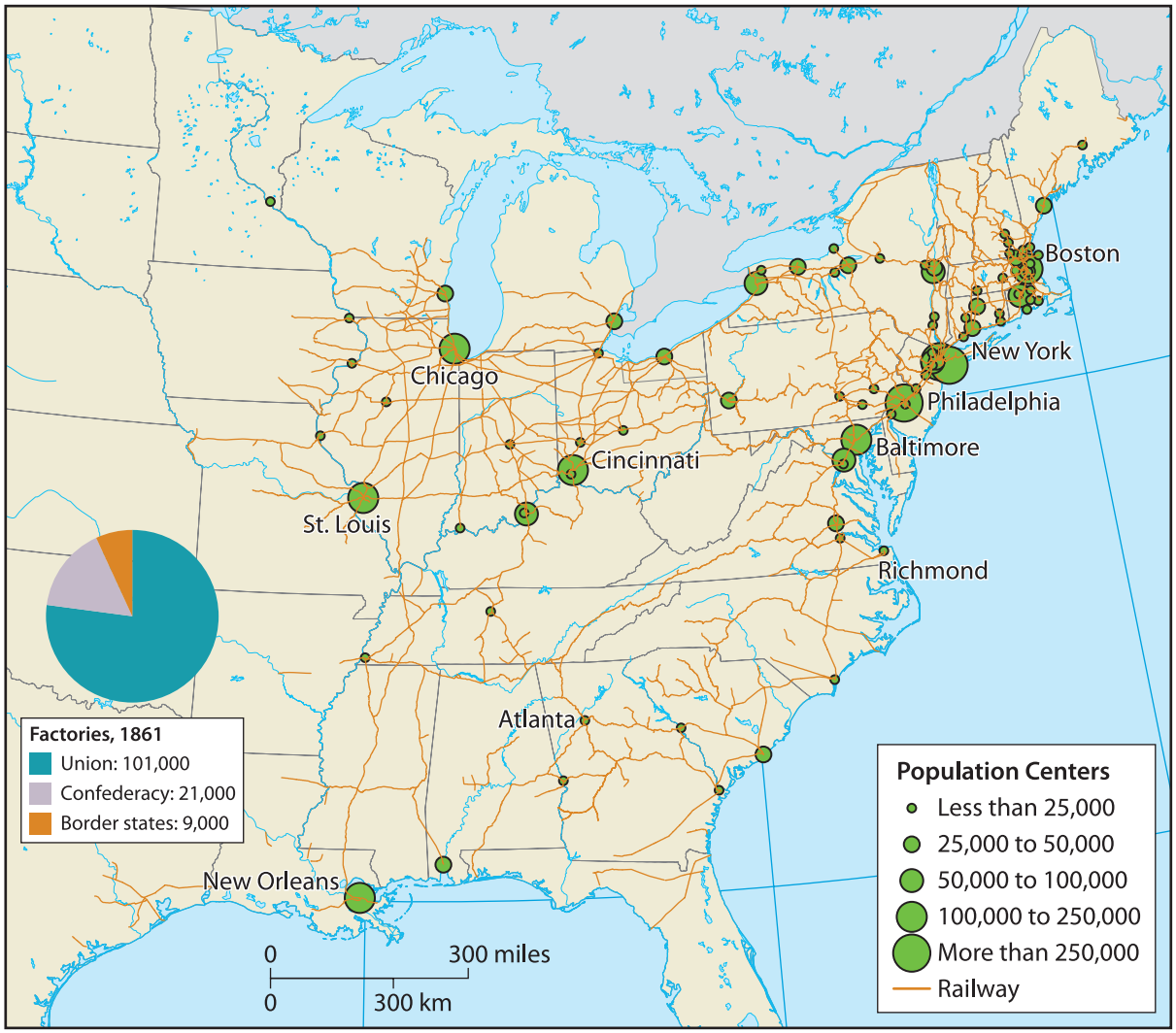
Major Events of the Civil War

At the beginning of the Civil War, the Union held the advantage in terms of population and economy. The North was much more industrialized than the South and therefore better equipped to produce arms and equipment. The Confederacy initially benefited from having many experienced military officers, some of whom had resigned from the U.S. Army to join the Southern cause. Because the overall Union goal was to quell rebellion in the South, the Confederate forces also enjoyed the advantage of defending their own lands rather than having to launch expeditions into what was now enemy territory.

Initially, one Union strategy was proposed by General Winfield Scott, a national hero for his leadership in past conflicts and the highest-ranking general of the U.S. Army. Scott sought to blockade the Confederates on the Atlantic and Gulf coasts while sending troops to control the Mississippi River. By targeting the coasts and waterways, Scott hoped to take advantage of the Confederates' limited naval power and shut down routes for trade, resupply, and communication.

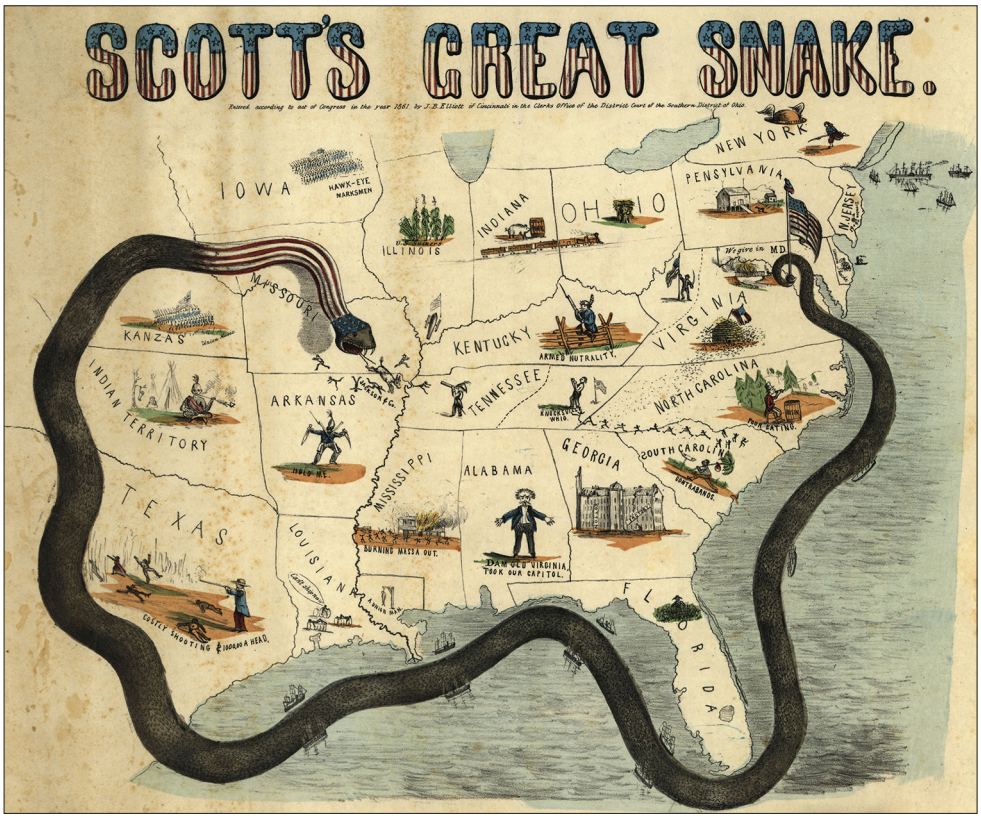
The coastal blockade, which was declared in April 1861 and lasted essentially until

Rail Network, 1861



Throughout the war, the North had a larger and more urbanized population with greater industrial capacity. It also had a denser and more developed rail network, facilitating the rapid movement of goods and people.

the end of the war, would eventually accomplish a series of related goals. First, it would prevent the Confederacy from exporting its trade goods—most notably cotton and tobacco—to European trading partners, damaging the ability of the Southern economy to generate revenue from foreign trade. It would also hinder the import of goods, such as weapons, that the Confederacy was unable to manufacture in adequate numbers. Finally, it would challenge the movement of troops and their equipment along the coast. Capturing the Mississippi would split the Confederacy in half geographically and create similarly severe logistical problems inland while isolating the westernmost Confederate states and territories.



Clamoring for decisive action, Northern journalists and politicians poked fun at Winfield Scott's plan to methodically surround the Confederate forces with a large army.

Scott wanted to buy time to train and supply a professional army, and unlike most observers of the day, he anticipated that the war would last for years. Given this, and considering how the design for Scott's plan visually resembled a giant snake encircling Confederate territory, the strategy was mockingly dubbed the Anaconda Plan.

The Battle of Bull Run (First Manassas)

Under intense public and political pressure for a swift victory, the Union launched a major campaign toward Richmond, Virginia. This, it was hoped, would bring a swift end to both the war and the Confederacy.

Despite reservations about the readiness of his force, Union general Irvin McDowell departed Washington for Richmond under orders to accomplish this. On July 21, 1861, McDowell encountered Beauregard's Confederate army at Manassas, Virginia, in what is now called the First Battle of Bull Run. Beauregard's army was soon reinforced by General Joseph E. Johnston's army, which included the brigade of General Thomas "Stonewall" Jackson. Though both Union and Confederate armies were of similar size and had largely inexperienced soldiers, the Confederate troops forced the Union into a retreat. Together, the two sides suffered some

five thousand casualties. The prospect of a quick and relatively bloodless war suddenly seemed remote. More than a year later, in August 1862, a second, larger battle would be fought on the same site, with Union casualties roughly double those of the Confederates.

Conscription

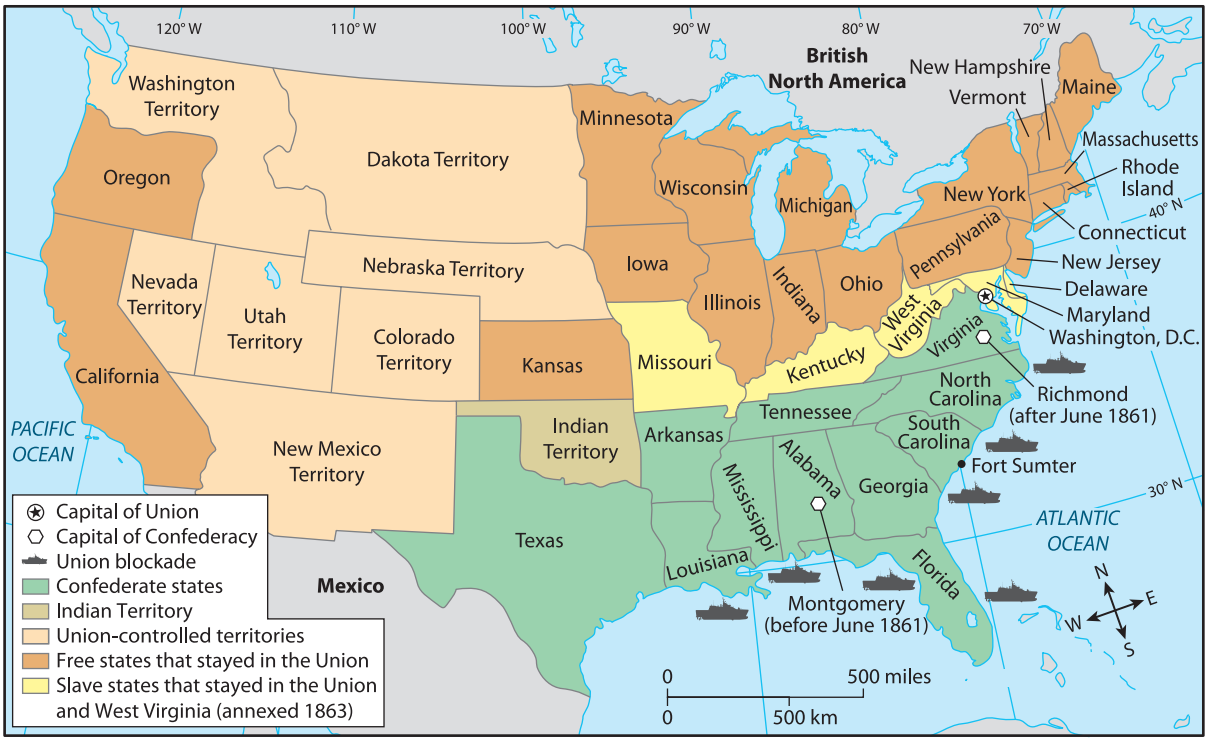
As the Union and Confederacy began to dig in for a lengthy conflict, both eventually accepted that they must draft soldiers to supplement their volunteer armies. In the Confederacy, conscription laws first went into effect in 1862 and were renewed through 1864, by which time enforcement had grown lax. In the Union, similar measures were passed in 1863 and lasted until the end of the war.

The draft was enormously unpopular in both the North and the South. Many rioted in protest, and thousands of families kept their sons out of the fighting by fraud or bribery. In some towns and counties, local officials refused to cooperate with conscription efforts. To subdue protests and enforce the conscription, the Union also passed an 1863 law formally authorizing the president to suspend habeas corpus, or the legal principle that a person cannot be held without trial. Under the new wartime measure, Lincoln declared that prisoners of war, along with suspected spies, traitors, and defectors, could be imprisoned at length without receiving a jury trial. This curtailment of civil liberties was controversial, but it was also legal; the need to restrict civil liberties in temporary and extreme

SACKING BROOKS'S CLOTHING STORE.

The New York draft riots of 1863 were the most violent and prolonged civil disturbance in response to the Union draft laws.

The Union and the Confederacy



At the beginning of the war, most territory west of the Mississippi belonged to the Union, but large parts of the West were only minimally involved in the war, if at all. As the war progressed and Union victories in the West increased, General Scott's Anaconda Plan became more of a reality.

circumstances was foreseen by the Framers. The Constitution prohibits the suspension of habeas corpus except "in Cases of Rebellion or Invasion" that threaten "the public Safety."

Think Twice

How had attitudes toward the war changed in both the North and the South by 1863?

Early Battles in the West

While conscription plans were being put in place, the fighting continued. Union general Ulysses S. Grant undertook an extensive Western campaign aimed at capturing key sites along and around the Mississippi River. (*Western*, in Civil War times, meant roughly "west of the Appalachian Mountains.") At the Battle of Shiloh in southwestern Tennessee, Grant's armies ultimately achieved a costly but crucial victory against forces led by Confederate general Albert Sidney Johnston and Beauregard. In February 1862, Grant had already gained fame for his capture of Forts Henry and Donelson near the Tennessee–Kentucky border. Now, in April 1862, his army was much deeper into enemy territory. The Union withstood a surprise attack from Johnston before regrouping and driving off the Confederates. Johnston died in the attack, becoming the highest-ranking

officer to be killed in action during the Civil War. The high death toll of this conflict led to criticism of Grant's tactics, but the conflict helped solidify Union control over the upper portions of the Mississippi River. Controlling the entire river was a key part of the Anaconda Plan because, similar to the Atlantic and Gulf coastal blockades, it would limit Confederate troop movements, cut off the westernmost Confederate states from providing aid to the rest, and restrict trade within the Confederacy.

At the end of April 1862, Union naval forces under Admiral David Farragut captured New Orleans after sailing up the Mississippi River; Union troops formally occupied the city by May 1. A major port and the most populous Confederate city at the time, New Orleans was a key regional center of industry and trade. Despite widespread initial criticism, the Anaconda Plan was succeeding in the West. A Confederate counterinvasion of New Orleans in early August was repelled after a brief but intense battle.

Early Battles in the East

The next major engagement in the East was the Battle of Antietam near Sharpsburg, Maryland. In early September 1862, Confederate general Robert E. Lee launched his first major invasion of the North, passing through the border state of Maryland en route to disrupting rail lines in Pennsylvania.

On September 17, 1862, Union general George B. McClellan stopped Lee short

The Battle of Antietam brought an end to General Lee's first attempt to invade the North.

near Sharpsburg. Often described as a tactical draw but a strategic victory, for the North Antietam proved that the Union could repel a sizable Confederate army led by one of its most brilliant commanders. The battle resulted in some 22,700 casualties, with slightly more Union casualties than Confederate.

The Emancipation Proclamation

President Lincoln, who had been waiting for a major Union military success, seized on Lee's thwarted invasion at Antietam to claim a victory for the Union. Presenting the battle as a turning of the tide for the Union cause, and thus a reason to keep fighting rather than negotiate a peace, he went on to issue the Emancipation Proclamation in January 1863. Lincoln declared that the eleven Confederate states and some outlying territories were areas "in rebellion" and that all enslaved persons in these areas would be considered free. The border states, which Lincoln deemed

PRIMARY SOURCE: THE EMANCIPATION PROCLAMATION, 1863

Whereas, on the twenty-second day of September, in the year of our Lord one thousand eight hundred and sixty-two, a proclamation was issued by the President of the United States, containing, among other things, the following, to wit:

"That on the first day of January, in the year of our Lord one thousand eight hundred and sixty-three, all persons held as slaves within any State or designated part of a State, the people whereof shall then be in rebellion against the United States, shall be then, thenceforward, and forever free; and the Executive Government of the United States, including the military and naval authority thereof, will recognize and maintain the freedom of such persons, and will do no act or acts to repress such persons, or any of them, in any efforts they may make for their actual freedom.

"That the Executive will, on the first day of January aforesaid, by proclamation, designate the States and parts of States, if any, in which the people thereof, respectively, shall then be in rebellion against the United States; and the fact that any State, or the people thereof, shall on that day be, in good faith, represented in the Congress of the United States by members chosen thereto at elections wherein a majority of the qualified voters of such State shall have participated, shall, in the absence of strong countervailing testimony, be deemed conclusive evidence that such State, and the people thereof, are not then in rebellion against the United States."

Now, therefore I, Abraham Lincoln, President of the United States, by virtue of the power in me vested as Commander-in-Chief, of the Army and Navy of the United States in time of actual armed rebellion against the authority and government of the United States, and as a fit and necessary war measure for suppressing said rebellion, do, on this first day of January, in the year of our Lord one thousand eight hundred and sixty-three, and in accordance with my purpose so to do publicly proclaimed for the full period of one hundred days, from the day first above mentioned, order and designate as the States and parts of States wherein the people thereof respectively, are this day in rebellion against the United States. . . .

And by virtue of the power, and for the purpose aforesaid, I do order and declare that all persons held as slaves within said designated States, and parts of States, are, and henceforward shall be free; and that the Executive government of the United States, including the military and naval authorities thereof, will recognize and maintain the freedom of said persons.

Source: "Emancipation Proclamation (1863)." Milestone Documents. National Archives. https://www.archives.gov/milestone-documents/emancipation-proclamation.

necessary allies, were unaffected, as were Confederate areas that had already come under Union control.

While the defense of slavery was central to Southern secession, Confederate leaders initially framed their focus as preserving states' rights. The Union's purpose in fighting the war, up until the Emancipation Proclamation, was only to bring the rebellious states back under its control. With this decree, abolishing slavery now became an explicit goal of Union involvement in the Civil War.

Yet the Emancipation Proclamation did not immediately affect the lives of enslaved persons. The Union did not control the states that were in rebellion, so it could not enforce the decree there. People held in slavery could find freedom only if they could first manage to escape their enslavers and then reach Union-controlled territory. Both steps were extremely difficult and dangerous. Nonetheless, some five hundred thousand enslaved persons—about one in seven—took their chances and "self-emancipated" by crossing the advancing Union line. The Union actively recruited these brave escapees into its armed forces despite the protests of some individual commanders. Many formerly enslaved men took up the offer; more than two hundred thousand African American soldiers and sailors fought for the Union cause, eventually comprising about 10 percent of the total Union forces.

One consequence of Lincoln's Emancipation Proclamation was a significant rise in abolitionist support for the war. A less direct but nonetheless important effect was to impair Confederate efforts at foreign diplomacy. Because its states produced a vast quantity of cotton, several European countries—most notably Great Britain—desired to remain on friendly terms with the Confederacy. A year earlier, in 1862, this "cotton diplomacy" had raised the possibility that Britain might recognize the Confederacy and perhaps even wade into the war on the Confederate side. The Emancipation Proclamation undermined any hope of such an alliance. For the European powers, an alliance with the Confederacy now unavoidably meant an alliance with the cause of slavery.

Think Twice

Compare the stated purpose of the Emancipation Proclamation with its actual effects.

Gettysburg and Vicksburg

Even after the slaughter at Antietam, the worst of the fighting still lay ahead. In June 1863, Lee began his second attempt at a Northern invasion. He crossed Maryland and advanced into Pennsylvania before Union forces under George Meade stopped him at Gettysburg. There, from July 1 to July 3, 1863, almost a hundred thousand Union soldiers

PRIMARY SOURCE: GETTYSBURG ADDRESS, ABRAHAM LINCOLN, 1863

On November 19, 1863, Lincoln presided over the dedication of the Gettysburg National Cemetery on the site of the June 1863 battle. He used his speech to rally support for the Union cause as one of "government of the people, by the people, for the people." Lincoln's address that day has since become one of the most famous political speeches in U.S. history.

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

Source: Lincoln, Abraham. *Gettysburg Address, Delivered at Gettysburg, Pa. Nov. 19th 1863*. Library of Congress. https://hdl.loc.gov/loc.rbc/rbpe.24404500.

faced a slightly smaller Confederate army. After three days of intense fighting, more than fifty thousand were killed, wounded, captured, or missing.

The Battle of Gettysburg is widely considered the turning point of the Civil War. Lee had once again failed to win a battle in the North. His attempt to pressure the Union into negotiating a truce had failed as well. To many, it now seemed that a Union victory was assured and was only a matter of time.

In the meantime, the Union forces had also made gains farther south. At Vicksburg, Mississippi, Grant had led a six-week-long siege of the last Confederate base on the Mississippi River. The surrender came on July 4, one day after the Battle of Gettysburg ended. Scott's Anaconda Plan, now more than two years in the making, was essentially complete. The Union controlled the entire Mississippi River, the major railroads, and all sea traffic. The Confederates were surrounded.

Four months after the Battle of Gettysburg, Lincoln visited the battlefield to conduct a dedication ceremony for a graveyard to honor the war dead. He gave a short but moving and extraordinarily diplomatic speech about the meaning of the Civil War. He spoke of the soldiers who gave their lives to bring about "a new birth of freedom" for the United States.

Breaking the Confederacy

Although major campaigns slowed, important Union victories at Chattanooga in late 1863 set the stage for advances into the Deep South. The following spring, Lincoln appointed Grant to command the Union Army. Relentless and well-reinforced, he gradually wore away at Lee's army. This, it was hoped, would finally bring the war to an end—despite the firm resistance from Lee and other Confederate leaders.

Farther south, Union forces under General William Tecumseh Sherman worked to undermine the Confederacy's ability to continue fielding, feeding, and otherwise supplying its troops. Sherman marched south from Tennessee and, after weeks of siege and battles around the city, ultimately captured Atlanta, Georgia, on September 2, 1864. After resupplying his troops and driving out the city's civilian population, he headed for the coastal city of Savannah, Georgia, in what is now called Sherman's March to the Sea. His forces left a trail of destruction in their wake. Sherman targeted not only military installations but also transportation infrastructure such as railways and economic assets such as factories and farms. Union-destroyed Southern railroads, twisted into a loop to prevent further use, became known as "Sherman's neckties." According to Sherman, his strategy was "to whip the rebels, to humble their pride . . . and make them fear and dread us." He wanted to "make Georgia howl."

After capturing Savannah on December 21, Sherman pivoted northward and continued the looting and destruction of similar targets in the Carolinas, such as the South Carolina capital of Columbia. Sherman's Carolinas campaign continued until the war's end.

Think Twice

Explain two of the most consequential events in the course of the Civil War.

Sherman's troops did not follow a single direct route from Atlanta to Savannah. Rather, they fanned out across northern Georgia, wreaking havoc, and reconverged when they reached the coast. A key tactic of this strategy was destroying Southern railroad lines.

The War Ends

After major Union victories like the capture of Atlanta, a Union victory in the war appeared much more certain by the presidential election of November 1864. Without the Confederate states' participation in the election, President Lincoln was easily reelected.

In his second inaugural address, delivered on March 4, 1865, Lincoln tried to build support for his vision of the postwar United States. He recognized that in both the North and the South, tremendous challenges awaited families, farms, and businesses as they recovered from the disruption and destruction of war. Returning soldiers, many seriously wounded, would need assistance reentering everyday life. And of course, the states that had seceded would need to be reintegrated into the United States. Lincoln called for this reconstruction to be undertaken "with malice toward none, with charity for all." He argued that only in this way could "a just and lasting peace" be achieved.

The Civil War effectively ended just over a month later. On the morning of April 9, 1865, Confederate general Robert E. Lee faced Union general Ulysses S. Grant at

PRIMARY SOURCE: SECOND INAUGURAL ADDRESS, ABRAHAM LINCOLN, 1865

Fellow-Countrymen:

At this second appearing to take the oath of the Presidential office there is less occasion for an extended address than there was at the first. Then a statement somewhat in detail of a course to be pursued seemed fitting and proper. Now, at the expiration of four years, during which public declarations have been constantly called forth on every point and phase of the great contest which still absorbs the attention and engrosses the energies of the nation, little that is new could be presented. The progress of our arms, upon which all else chiefly depends, is as well known to the public as to myself, and it is, I trust, reasonably satisfactory and encouraging to all. With high hope for the future, no prediction in regard to it is ventured. . . .

. . . The Almighty has His own purposes. "Woe unto the world because of offenses; for it must needs be that offenses come, but woe to that man by whom the offense cometh." If we shall suppose that American slavery is one of those offenses which, in the providence of God, must needs come, but which, having continued through His appointed time, He now wills to remove, and that He gives to both North and South this terrible war as the woe due to those by whom the offense came, shall we discern therein any departure from those divine attributes which the believers in a living God always ascribe to Him? Fondly do we hope, fervently do we pray, that this mighty scourge of war may speedily pass away. Yet, if God wills that it continue until all the wealth piled by the bondsman's two hundred and fifty years of unrequited toil shall be sunk, and until every drop of blood drawn with the lash shall be paid by another drawn with the sword, as was said three thousand years ago, so still it must be said "the judgments of the Lord are true and righteous altogether."

With malice toward none, with charity for all, with firmness in the right as God gives us to see the right, let us strive on to finish the work we are in, to bind up the nation's wounds, to care for him who shall have borne the battle and for his widow and his orphan, to do all which may achieve and cherish a just and lasting peace among ourselves and with all nations.

Source: Lincoln, Abraham. Second inaugural address. March 4, 1865. Famous Presidential Speeches. Miller Center, University of Virginia. https://millercenter.org/the-presidency/presidential-speeches/march-4-1865-second-inaugural-address.

Appomattox Court House in central Virginia. There, Lee's Army of Northern Virginia, already on the retreat, attempted to push through a much larger force of Union cavalry and infantry. Within a few hours, it was evident the Confederates could not break through. After a brief truce, a demoralized Lee agreed to meet Grant and formally surrender. In a sign of respect for his enemy's dignity, Grant released nearly all of Lee's officers and troops, only asking them to swear an oath not to fight against the U.S. government anymore.

Other Confederate forces throughout the South surrendered by June. Lincoln, however, would not live to see this development. On the evening of April 14, he was shot by John Wilkes Booth at Ford's Theatre in Washington, D.C. Despite Lee's recent surrender, Booth and his co-conspirators believed that the Confederacy still stood a chance of winning the war. Booth, who had looked on with approval at John Brown's hanging, also bitterly opposed the abolition of slavery.

Booth and his collaborators believed that eliminating the top leadership of the Union would give the Confederacy an opportunity to regain the upper hand. To that end, they attempted to kill not only Lincoln but also Vice President Andrew Johnson and Secretary of State William Seward. Johnson escaped unharmed, and although Seward was seriously wounded in an assassination attempt, he survived. Johnson was able to promptly assume the presidency upon Lincoln's death. Thus, it was Johnson who oversaw the formal end of the war—and the beginnings of the very complicated, and very political, postwar period known as Reconstruction.

Think Twice

What were the principles by which Lincoln intended to lead Reconstruction?

Reconstruction

At the end of the Civil War, the South was in ruins. The economy had been destroyed, and its cities and farms had been burned and looted. With the Confederacy now a thing of the past, Confederate money no longer had value. A society built on enslaved labor needed to be rebuilt under conditions of general poverty and widespread lawlessness.

Before his death, Lincoln had proposed a fairly lenient plan for Reconstruction, or how the legacy of slavery and the readmission of seceded states would be addressed. Under Lincoln's plan, the federal government would swiftly reestablish state governments and

grant amnesty to all but the highest-ranking Confederates. Now, President Johnson—a Southerner who had remained loyal to the Union during the war—argued for a similarly lenient plan, with numerous additional pardons for Confederate leaders. He believed that *restoration*, not reconstruction, was needed. Under his plan, confiscated property in the South would be restored to its owners, and state governments there would have autonomy as the region rebuilt.

Democrats, some of whom had urged a peace settlement with the Confederacy all along, supported Johnson's plan. However, Radical Republicans—a predominantly Northern antislavery faction—resisted. They felt that the plan was neither punitive enough toward the Confederacy nor protective enough of the rights of newly freed African Americans. Nonetheless, for a brief time, Republicans in Congress agreed to postpone their own actions until they could see how the presidential plan would play out. However, even before the war had concluded—and while Lincoln was still alive—Congress took an important step, prohibiting slavery via the Constitution's amendment process. In January 1865, Congress passed the Thirteenth Amendment, which was ratified by the states at the end of that year:

> Neither slavery nor involuntary servitude, except as a punishment for crime whereof the party shall have been duly convicted, shall exist within the United States, or any place subject to their jurisdiction.

The Reconstruction Amendments

Perhaps Congress's most important task of Reconstruction was to further amend the Constitution in light of the problems that had led to such extreme and intense sectional disagreements and a devastating civil war. In June 1866, Congress proposed the Fourteenth Amendment to address some of the most basic issues. It was ratified by the states two years later. The table on page 107 explains the significance of the amendment's five provisions.

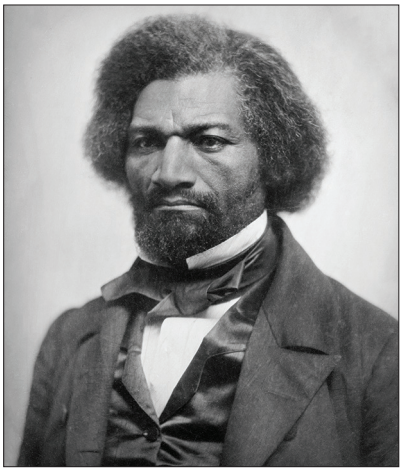
Two years after that, in 1870, the states ratified the Fifteenth Amendment, which prohibited the denial of the **franchise** to anyone on the basis of race, color, or previous servitude (including enslavement). In effect, this granted constitutional protection for the voting rights of African American men over widespread and violent opposition in some parts of the South. The protection of voting rights for African American men had become a key topic in a debate, by then nationwide, about how Reconstruction should proceed. Opponents of the amendment—including several prominent Northerners—often argued that, for one reason or another, African Americans were simply

The Fourteenth Amendment

	Provisions	Notes
Section 1	All people born or naturalized in the United States are citizens. States must observe due process, cannot limit citizenship rights, and must provide equal protection to all.	This is the principle of *birthright citizenship*. Its main effect at the time was to declare that formerly enslaved persons were citizens.
Section 2	Representatives are apportioned by population. If states deny the right to vote to adult males, those people do not count for apportionment either.	This section provided states with an incentive not to try to disenfranchise newly freed African American men. Women (of any race) would not obtain the franchise for another fifty-five years.
Section 3	People who violate their oath of office by participating in an insurrection may not hold office in the future. Congress can override this by a two-thirds majority.	This section gave Congress the right to decide which former Confederate officials could be rehabilitated into holding office.
Section 4	U.S. public debt is valid; debts of the Confederacy are not, and the United States will not pay them. Nor will the United States compensate former slaveholders for freeing their enslaved workers.	This section addresses two economic questions that many had at the end of the war: Would the United States take over the Confederacy's war debts, and would there be any compensation for the economic loss of enslaved labor? The amendment answers no to both questions.
Section 5	Congress has the power to enforce the amendment by making laws.	Many Reconstruction-era laws were, in fact, attempts to hold states to their responsibilities under this amendment.

The Fourteenth Amendment consists of five sections intended to set the terms of the post–Civil War political order. Among its other provisions, the amendment enshrined birthright citizenship, barred those who rebelled against the Union from holding federal and state office, and disclaimed any debt for emancipating enslaved people. Although various parts of the amendment have been invoked many times since the 1860s, the original language still reflects the priorities of the post–Civil War era.

PRIMARY SOURCE: "WHAT THE BLACK MAN WANTS," FREDERICK DOUGLASS, 1865



During the Reconstruction era, Frederick Douglass demanded government action to secure land, voting rights, and civil equality for African Americans. The following passage is excerpted from a speech given by Douglass to the Massachusetts Anti-Slavery Society in April 1865.

We may be asked, I say, why we want it [the right to vote]. I will tell you why we want it. We want it because it is our *right*, first of all. No class of men can, without insulting their own nature, be content with any deprivation of their rights. We want it, again, as a means for educating our race. Men are so constituted that they derive their conviction of their own possibilities largely from the estimate formed of them by others. If nothing is expected of a people, that people will find it difficult to contradict that expectation. By depriving us of suffrage, you affirm our incapacity to form an intelligent judgment respecting public men and public measures; you declare before the world that we are unfit to exercise the elective franchise, and by this means lead us to undervalue ourselves, to put a low estimate upon ourselves, and to feel that we have no possibilities like other men.

Source: Douglass, Frederick. "What the Black Man Wants: Speech of Frederick Douglass." In *The Equality of All Men Before the Law*. Boston: Press of Geo. C. Rand & Avery, 1865, p. 37.

not ready to exercise the responsibilities of the franchise. In fact, disagreement on this point drove a rift within the women's suffrage movement, which during the war had been closely allied with the abolitionist cause. Some, including Elizabeth Cady Stanton, urged that white women be granted the right to vote before African American men.

Frederick Douglass argued that African American men needed the right to vote to protect themselves from racially repressive laws and policies. In an 1865 speech entitled "What the Black Man Wants," he provided a forceful moral argument for what was by then recognized as the emerging Republican position on voting rights. He called for African American men to be given not just

the franchise but equal participation in American political life. He also stated that depriving them of the right to vote was, in essence, racist, as it suggested African Americans had an "incapacity to form an intelligent judgment" about whom to vote for. In doing so, Douglass pushed back against the widespread but patronizing claim that newly freed African Americans were, because of limited educational opportunities, not ready to be full participants in the country's political life.

Think Twice

What guarantees did the Reconstruction Amendments make?

Reconstruction Policies and the Struggle for Equality

The former Confederate states resisted and undermined the Reconstruction process in ways large and small, legal and **extralegal**. In less than a year, Congress's patience was exhausted, and the legislators began replacing Presidential Reconstruction with a much stricter set of policies known as Congressional Reconstruction.

The Radical Republicans pushed for greater reforms than Presidents Lincoln and Johnson had envisioned. They believed that African Americans ought to have the same political rights as their white peers, and they consistently endorsed measures that would promote and protect African American political participation. Representative Thaddeus Stevens and Senator Charles Sumner emerged as the leaders of a faction that pushed for more federal intervention than any president had yet planned to provide. It was their plan that, in 1867, led to the partition of the South into federal military districts, each governed by a Union general. This regime of military rule would, they envisioned, only end when the former Confederate states became eligible to rejoin the Union.

The terms on which that would happen were also a subject of debate. Under Presidential Reconstruction, former Confederate states could be readmitted to the Union once 10 percent of the white men in the state took an oath of loyalty to the United States. But the congressional plan, the Wade–Davis Bill, increased the requirement to 50 percent. Moreover, pledging current loyalty would not be enough An oath taker would also have to swear they had never aided the Confederacy.

Congress had passed the Wade–Davis Bill in 1864, but Lincoln had vetoed it. Under Johnson, Congress passed bills that aggressively pursued equality and aimed to hold traitors accountable. It established and financed a Freedmen's Bureau to provide supplies, education, job assistance, and medical care to newly freed people, along with assistance in reuniting with loved ones separated by war and slavery. This was, at the time, a highly controversial use of

public funds and a vast expansion of the federal government's involvement in the postwar South. Those who opposed it argued that it would interfere with states' rights and make newly freed African Americans dependent on the government. Those in favor argued that without direct help and protection from the federal government, at least at first, freed persons and their families would be shut out from meaningful participation in Southern economic and political life.

Think Twice

Explain one argument for and one against the creation of the Freedmen's Bureau.

Reconstruction in Louisiana

Congressional Reconstruction helped pave the way for many African American men to vote and for the first Black senators and representatives to serve in the U.S. Congress. Many more won office as state legislators. In some states, including Louisiana, conditions were relatively favorable for African American political participation. Louisiana's 1868 constitution, adopted after the war, eliminated many barriers that had disproportionately affected freed persons. For instance, it granted citizenship and civil rights to those who professed loyalty to the Union without limiting those rights based on ethnic or racial heritage. It removed economic hurdles, too, by providing for public

This 1872 portrait depicts the first African American senator and representatives in Congress, elected in the late 1860s and early 1870s.

education and abolishing the need to own property to hold office. Oscar J. Dunn, the first African American lieutenant governor of a state, took office in New Orleans in 1868. Dunn briefly served as the first African American acting governor in 1871.

A variety of factors led to these unusually progressive outcomes. For one, Louisiana had been under military **occupation** since Union forces captured New Orleans in April 1862. The U.S. Army tamped down racial violence and rebellion and made it relatively safe for African Americans to participate in public life, despite the hostility felt by many aggrieved Confederates. That hostility would fester over the coming years and eventually manifest in outright violence and intimidation directed at the state's African American and white Republican population, of which Louisiana had a larger share of than most other former Confederate states. Finally, Louisiana had been a multiracial and multiethnic society

since French colonial times. There was a large population of free people of color—people of African, European, and Indigenous heritage who had never been enslaved. It was ordinary for them to own land, practice trades and professions, and accumulate wealth. However, the sociopolitical gains reflected in Louisiana's 1868 constitution would not endure. The loss of the war, the sudden rise in political participation by the formerly enslaved, and economic displacement, all coupled with a lingering resentment toward the Republican Party and the federal government, would result in severe societal backlash.

As Louisiana's first African American lieutenant governor, Oscar J. Dunn also served as president pro tempore of the Louisiana State Senate, making him the only formerly enslaved person serving in a state senate at the time.

Think Twice

How did Louisiana differ from other Southern states in its post–Civil War political history?

Resistance to Reconstruction: Black Codes and the Ku Klux Klan

Officially and unofficially, many Southerners resisted both the letter and the spirit of Reconstruction policies. State and local governments passed laws known as Black Codes that restricted African Americans' rights. The aim of these laws was to preserve white supremacy and replicate the power structures of slavery in all but name.

Not every Southern state passed such measures. In states where they existed, including Louisiana, Black Codes had a variety of punitive effects. For example, South Carolina's Black Codes (1865) restricted the jobs that freed persons could hold and barred persons of color from possessing swords or firearms. In Mississippi, the Black Codes prohibited interracial marriage and even included language resembling the Fugitive Slave Act, stating that freed persons who quit their jobs could be arrested and brought back to their employers. In some instances, African Americans were barred from most jobs, yet unemployment was also a crime.

Those who staunchly opposed Reconstruction policies also organized into societies such

as the Ku Klux Klan (KKK) and the Knights of the White Camelia. These white supremacist groups used violence and intimidation to prevent African American citizens from participating in local politics or integrating into free society. These groups were able to mobilize dozens to hundreds of members, depending on the size of the community and the scale of the attack. Moreover, they often enjoyed at least the unspoken support—and sometimes the open participation—of their towns' civic and business leaders.

The targets of these groups included not only African American Southerners but also white sympathizers. Such sympathizers, if they came from the North, were accused of being *carpetbaggers*, or opportunists who had come down to take advantage of the South's economic weakness. (This term was meant to insult and suggested that the Northerners had come down hastily to seek their fortunes with only a carpet bag—a piece of lightweight luggage similar to a satchel.) Those from the South who supported Reconstruction, sought to reintegrate with the Union, and were generally aligned with the Republican Party were deemed *scalawags*, a word treated as nearly synonymous with *traitors*.

The federal government attempted to curb such vigilantism by passing three statutes known as the Enforcement Acts (1870–71). The first act banned the harassment of fellow citizens. The second act gave the federal government authority over national elections and local polling places with the objective of preventing voter intimidation. The third granted the president the power to use the armed forces and suspend habeas corpus against any groups that were trying to deny equal protection under the Fourteenth Amendment. Together, the Enforcement Acts and military rule significantly suppressed the intimidation of newly freed citizens in the South.

Think Twice

What kinds of official and unofficial resistance did Reconstruction policies encounter?

Economic Challenges: Sharecropping

The economic legacy of slavery was difficult to overcome, and the help provided by the Freedmen's Bureau was quite limited. Enslaved persons had few if any possessions and no land of their own, and this did not change after emancipation. Many resorted to working as sharecroppers, often for the same people who had enslaved them. Under the sharecropping system, a landowner would provide the sharecropper with land for farming, seed for planting, and other farming supplies on credit. The loan did not have to be repaid until crops were harvested in the fall, at which time the sharecropper paid by giving the landowner a share of their crop. While white farmers also worked as sharecroppers, nearly all African American farmers in the postwar South did so.

In theory, this system offered more autonomy than slavery, but in practice, it worked to keep the sharecroppers perpetually poor and in debt. Commonly, the price of the goods lent by the landowner exceeded the value of the crops, so the sharecropper remained in debt—a vicious cycle that could persist for a lifetime. Few formerly enslaved persons could read or do arithmetic because they had been denied schooling, so they had no way to protect themselves if a landlord wanted to cheat them. In addition, laws kept sharecroppers from seeking the best price for their crops by requiring them to work with certain dealers.

Moreover, mounting debts and restrictive laws meant that sharecroppers were effectively unable to leave their land, just as they had been under the plantation system. Black Codes made it illegal for a sharecropper to enter into a new employment contract if they had any debt. If a sharecropper with debt tried to leave the farm anyway, they could be arrested as a fugitive. Because debt was a fact of life for most sharecroppers, this law generally meant that they could not leave at all. With few chances to build wealth, get an education, or buy their own land, a great many sharecroppers were free in name only.

Think Twice

How was sharecropping different from the system of slavery that preceded it? How were the two similar?

The Rise of Jim Crow

Reconstruction officially lasted a little more than a decade before national events and the protests of aggrieved white Southerners forced its abandonment. The 1876 presidential election and the events that followed proved that even Republicans in the North had become disinterested in maintaining

Sharecropping persisted well into the twentieth century. This family of sharecroppers was photographed working a cotton farm in Mississippi in 1910.

Reconstruction efforts in the South. Recall that under the Electoral College system, each state submits a set of electors to cast the state's electoral votes. In the 1870s, accusations of fraud and intimidation in popular voting were rampant in many regions across the country. In three states—Louisiana, Florida, and South Carolina—disputes over vote counting led to rival slates of electors. A minor dispute also arose in Oregon. The decision about which electors would be accepted for each of the states would determine whether the Democratic candidate, Samuel Tilden of New York, or the Republican candidate, Rutherford B. Hayes of Ohio, would be the next president. Tilden had received 184 electoral votes to Hayes's 165. Both men claimed the twenty remaining from the contested states.

To resolve the dispute and choose a president, Congress appointed a bipartisan group known as the Hayes–Tilden Commission. The Democrats on the commission offered Hayes a deal: They would support his electors if he agreed to sharply curtail federal government involvement in Reconstruction. Among other things, they wanted him to recall the federal troops that occupied the former Confederate states and had been protecting the freed persons' rights and enforcing federal laws. Hayes accepted the deal. As a result of the Compromise of 1877, Rutherford B. Hayes became president, federal troops were withdrawn from the South, and Reconstruction officially ended.

Once federal troops withdrew, Southern states quickly reasserted control under white Democratic leadership. The Republican Party, which had briefly gained ground during Reconstruction, collapsed in most areas, and former Confederates filled the void. Discriminatory legislation known as Jim Crow laws began to spring up. These laws institutionalized **segregation** by allowing separate facilities of all sorts—schools, train cars, seating sections in theaters and buses, restaurants, restrooms, hotel rooms—for African Americans and white people. They also prohibited interracial marriage, barred African Americans from buying property in certain districts, and imposed artificial, race-based barriers to voting rights in the form of fees, tests, and property qualifications.

Overall, the project of Reconstruction was characterized by some enduring successes and some discouraging failures. The Reconstruction Amendments and the civil rights they protected remained the law of the land. As you will read in a later unit, after many decades, they would become the basis for newer and stronger civil rights legislation. In the meantime, entrenched practices of racial discrimination swiftly reemerged as soon as federal oversight ended—and in many cases, even before.

Think Twice

Explain one way in which Reconstruction was successful and one way in which it was a failure.

Unit 2: Revolutionary Advancement and Change

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Topic 1
The Western Frontier

Framing Question

How did the process of late nineteenth-century westward expansion change the economy, society, and culture of the United States?

This Levi Strauss & Co. ad from 1900 promotes riveted "waist overalls" as the ideal garment for cowboys, helping make them a symbol of the rugged American West.

Setting the Scene

An American Icon in the West

Levi Strauss's story begins like that of many European immigrants in the mid-1800s as they seek better opportunities in America. Strauss's family is poor, and when his father dies in 1846, he, his mother, and his two sisters are faced with a difficult choice: Stay in their small village in Bavaria—now a part of Germany—where opportunities are scarce, or take their chances in America. In 1847, they board a ship to New York City to reunite with two of Strauss's older brothers, who have opened a dry-goods store.

However, Strauss does not remain in New York City for long. In 1853, he makes the lengthy journey by ship to San Francisco. Like many others, he is attracted to the American West by the promise

of adventure and riches. While many come to pan for gold, Strauss seeks his fortune in a different way—by providing goods to the countless miners who flock to California during the Gold Rush.

Strauss's merchandise has to be transported across the country at a time when railroads extend only slightly beyond the Mississippi River. At first, Strauss sells dry goods, but his attention soon turns to addressing another important need of the miners: making pants that can withstand their highly demanding work. Strauss partners with a tailor and fellow Jewish immigrant, Jacob Davis, who has the idea to use rivets to strengthen work pants but needs financial support to patent his design. Together, Strauss and Davis begin to make durable pants, first using canvas from tents before switching to hard-wearing denim.

In May 1853, Strauss and his two brothers formally go into business. Twenty years later, in 1873, Levi Strauss & Co. produces the first "waist overalls," later to be known as blue jeans. Little does Levi Strauss know that the pants he designed for cowboys and miners will become not only a symbol of the American West but also one of the best-selling clothing items around the world.

The Continued Allure of the West

Romanticized American ideas about the West persisted; rather than fading, the excitement surrounding western settlement gained momentum during the mid-1800s. As you read in Unit 1, the Lewis and Clark expedition expanded Americans' understanding of the land beyond the Mississippi. Although some still believed the land was an uninhabitable desert, many settlers came to see the West's vast landscapes as full of economic promise. At the same time, settlers believed that western territorial expansion was, as John O'Sullivan had phrased it, the country's "manifest destiny": One day, the United States would span the North American continent from the Atlantic to the Pacific—further justifying the massive migration of people seeking prosperity.

The Draw of the Land

Land was viewed as the key to economic opportunity during westward expansion. Until the early 1900s, the United States remained a primarily agrarian society, with most Americans earning their living through farming. Inexpensive and abundant land, essential to growing crops and raising livestock successfully, was increasingly difficult to come by east of the Mississippi River. But west of the river, a vast area known as the Great Plains stretched all the way to the Rocky Mountains, offering millions of unfarmed acres of fertile, mostly flat land that could be efficiently

Families heading west along the Oregon and Santa Fe Trails traveled in wagon trains, as shown in this idealized 1866 painting. Traveling together provided settlers with a sense of community and opportunities for mutual aid.

planted and harvested. This made the Great Plains an ideal destination for farmers hoping to improve their prospects. Farther west, settlers took advantage of the dense forests to start logging operations and begin mining the region's abundant mineral deposits.

As Americans moved westward in the mid-1800s, many followed well-established migration paths, including overland routes. American fur traders had already been using what would become known as the Oregon Trail: a rough, dusty corridor that crossed the Rocky Mountains into the Oregon Country (later renamed the Oregon Territory upon becoming a U.S. territory). In 1843, the first large group of settlers traveled the Oregon Trail, setting a precedent for other wagon trains—some stretching a mile (1.6 km) in length—to follow in their footsteps. Each spring, families gathered in the river port of Independence, Missouri, to begin the grueling, two-thousand-mile (3,200 km) journey, often traveling with oxen, horses, and livestock on the six-month-long trek. Between three hundred thousand and five hundred thousand people migrated west along the Oregon Trail from the 1840s through the 1880s. Traders and settlers also used the Santa Fe Trail, which, like the Oregon Trail, began in Independence, Missouri. Settlers traveled overland through present-day Kansas and Colorado before arriving in Santa Fe, a key trading post where people exchanged goods for valuable commodities such as silver and furs.

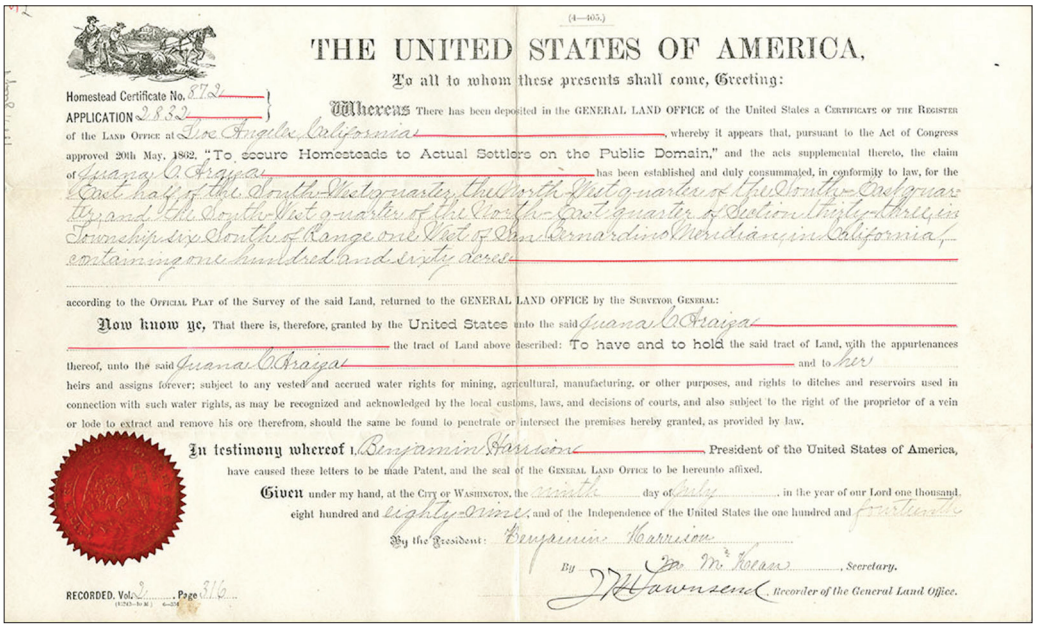
Think Twice

What motivated people to undertake the challenging journey to settle in the West?

The Homestead Act

The allure of land use in the West did not happen simply through word of mouth. With the passage of the Homestead Act, the federal government played a key role in encouraging many Americans—including those who might not have otherwise considered it—to move west. Passed by Congress in 1862, the legislation provided 160 acres (0.6 sq km) to individuals who could "prove up," or build a home on and farm, the land for a set period of time.

Any head of household or individual over the age of twenty-one was eligible to apply for a homestead, as long as they were a U.S. citizen or intended to become one. This eligibility included single women, immigrants, and formerly enslaved people—groups who faced significant barriers to property ownership in the East. Prospective homesteaders filed a temporary land claim and paid twelve dollars in fees at the nearest land office. If the homesteader could later prove they had built a home, lived on the land, and farmed it for five consecutive years, they gained legal ownership of the land by paying an additional six-dollar fee.



THE UNITED STATES OF AMERICA.

To all to whom these presents shall come, Greeting:

Homestead Certificate No. 872
APPLICATION 2832

Whereas There has been deposited in the GENERAL LAND OFFICE of the United States a CERTIFICATE OF THE REGISTER of the LAND OFFICE at Los Angeles, California, whereby it appears that, pursuant to the Act of Congress approved 20th May, 1862, "To secure Homesteads to Actual Settlers on the Public Domain," and the acts supplemental thereto, the claim of Juana C. Araiza has been established and duly consummated, in conformity to law, for the East half of the South West quarter, the North West quarter of the South East quarter of Section Thirty-three in Township six South of Range one West of San Bernardino Meridian in California, containing one hundred and sixty acres

according to the OFFICIAL PLAT of the Survey of the said Land, returned to the GENERAL LAND OFFICE by the SURVEYOR GENERAL:

Now know ye, That there is, therefore, granted by the United States unto the said Juana C. Araiza the tract of Land above described: To have and to hold the said tract of Land, with the appurtenances thereof, unto the said Juana C. Araiza and to her heirs and assigns forever; subject to any vested and accrued water rights for mining, agricultural, manufacturing, or other purposes, and rights to ditches and reservoirs used in connection with such water rights, as may be recognized and acknowledged by the local customs, laws, and decisions of courts, and also subject to the right of the proprietor of a vein or lode to extract and remove his ore therefrom, should the same be found to penetrate or intersect the premises hereby granted, as provided by law.

In testimony whereof I, Benjamin Harrison, President of the United States of America, have caused these letters to be made Patent, and the seal of the GENERAL LAND OFFICE to be hereunto affixed.

Given under my hand, at the CITY OF WASHINGTON, the ninth day of July, in the year of our Lord one thousand eight hundred and eighty-nine, and of the Independence of the United States the one hundred and fourteenth

By the President: Benjamin Harrison

By Jno. M. Moore, Secretary.

J. H. Lawrence, Recorder of the General Land Office.

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It was common for homesteaders to display their homestead certificates in their homes. This claim, filed by California settler Juana C. Araiza, was awarded under President Benjamin Harrison in 1889.

The Homestead Act of 1862 had a transformative effect on the development of the American West. Over 123 years, the act gave away about 10 percent of U.S. land—270,000,000 acres (1.1 million sq km)—across thirty states. There were four million claims filed under the act, more than half of which resulted in homesteaders successfully "proving up" and gaining legal ownership of their land.

While the act was in part aimed at helping poor families start their own farms, many could not afford the livestock, feed, equipment, and building materials associated with farming. The most successful homesteaders were often experienced farmers who had the means to relocate and begin again.

The opportunities afforded by the Homestead Act came with risks. The Great Plains' hot summers, bitter winters, and limited precipitation could be very challenging. The limited support systems and isolation could also prove difficult for homesteaders. As the century progressed, innovations such as improved windmills, steel plows, and mechanical threshing equipment made farming easier. However, the capital costs of purchasing such equipment remained high for small-scale farmers.

As you learned in Unit 1, western settlement had devastating effects on Native American communities, and the Homestead Act contributed to these outcomes. The federal government gave away land that Indigenous peoples had lived on, cared for, and

The Morrill Acts and Louisiana

As the population of the United States pushed westward, the federal government took steps to ensure that these new communities would have access to educational institutions. Congress passed the Morrill Act of 1862 and the Second Morrill Act of 1890, both of which provided land grants to the states for the purpose of establishing colleges and universities. These institutions focused on agriculture, engineering, and science—areas of study that were critical to the economic success of the growing country. The 1890 act specifically supported the creation of institutions for African American students.

The Morrill Acts enabled the founding of two land-grant schools in Louisiana: Louisiana State University and Southern University. Over time, additional public colleges and universities opened across the state, including Historically Black Colleges and Universities (HBCUs) like Grambling State University, which provided vital access to higher education for African Americans during segregation. In 1974, eight of the state's colleges and universities were brought under the University of Louisiana System, with a ninth school joining in 2011. Louisiana's public college and university system continues to shape the state's culture and economy.

depended on for generations, disregarding their deep and often ancestral connections to the land and its resources. This contributed to the displacement of Native communities and the continued erosion of their cultures and ways of life throughout the nineteenth century.

Think Twice

How did the Homestead Act of 1862 impact western settlement?

Ranching and Mining

Not all settlers on the Great Plains focused on crops. Many sought to make their fortune through cattle ranching instead. Wild cattle descended from Spanish herds had roamed the areas near the Mexican frontier for centuries, and by the mid-1860s, the Texas frontier was home to an estimated five million longhorn steers. Cattle ranchers and Eastern businesspeople recognized that they could make a fortune by rounding up the steers, taking them to railroad hubs, and shipping them via railroad to markets in the East, where each animal could fetch as much as fifty dollars. So began the cattle drives of the 1860s and 1870s. Cowboys drove cattle along the Chisholm Trail from Texas to railroad hubs in Kansas, including Wichita and Dodge City. Up to forty thousand cowboys lived on the Great Plains between 1865 and 1885. While cowboys occupy a legendary place in American popular culture, life on

the range was difficult, exhausting, and often dangerous.

Cattle drives lasted until the late 1870s, when the era of open-range grazing came to an end. Ranchers had started using the new invention of barbed wire to stake their claim and fence in their herds, and the practice of establishing large, permanent ranches began.

People also flocked west for the mining—gold, in particular. At the end of the Mexican-American War, the United States acquired vast western territories through the Treaty of Guadalupe Hidalgo in 1848. Among these was California, which became a state just two years later, in 1850. Unbeknownst to either Mexican or American leaders, in January 1848, just a few months before the end of the war, small gold nuggets had been discovered at Sutter's Mill, an under-construction sawmill in California. This discovery sparked the California Gold Rush in 1849, drawing hundreds of thousands of fortune seekers westward and accelerating the pace of U.S. territorial expansion. Unlike homesteaders, these "forty-niners" hoped to strike it rich not with what they could grow on the land but by uncovering the wealth buried *beneath* it.

Thousands of prospectors flocked to California in search of gold. Others, including the photographer who took this portrait, made their own fortune by catering to the area's growing population.

While the majority of forty-niners arrived in California to prospect for gold, others planned to earn a living by providing goods and services to those prospectors. Merchants capitalized on supply and demand to become rich, selling picks and shovels shipped from the East for as much as twenty times the original price. The California Gold Rush was short-lived; it was nearly over by 1861, the year the Civil War started. Yet its impact was far-reaching in its negative effects on both Native Americans and the region's environment.

Think Twice

Identify a challenge that cowboys and miners each faced as they attempted to make their fortunes in the West.

The Exodusters

As you read in Unit 1, the presidential election of 1876 and the Compromise of 1877 marked the official end of Reconstruction in the United States and ushered in a new era of economic

and political repression for African Americans in the South. Many Black Southerners looked to migration to the North and the Midwest—especially Kansas—as a way to escape worsening conditions in the South. Borrowing a term from the Bible, this group called themselves Exodusters, a reference to their exodus from the South to a new land in search of opportunity and promise. By the end of 1880, more than forty thousand Exodusters called Kansas home, and many others had settled in other parts of the Great Plains.

Many Exodusters considered Kansas—a state associated with infamous abolitionist John Brown and "Bleeding Kansas," the historic clash between "free soilers" and proslavery forces—a place where the unfulfilled promises of Reconstruction might finally become reality. Though thousands of Exodusters managed to succeed under the Homestead Act of 1862, others had arrived with very few resources, resulting in the state's establishment of the Kansas Freedman's Relief Association (KFRA) in 1879. The KFRA initially received aid from federal, state, and local governments but eventually relied primarily on private donations. The funds were used to build temporary housing and schools as well as offer some monetary assistance to the Exodusters.

Think Twice

Why did so many Exodusters choose to migrate to Kansas?

Westward Expansion of Faith

While many would-be settlers were motivated by the promise of land and economic opportunity, others were compelled to venture west for religious reasons. For some, such as the Mormons, members of the Church of Jesus Christ of Latter-day Saints, the goal was to establish a community free from religious persecution. There, Mormons would not be subject to U.S. and legal restrictions and could instead form a remote community with its own laws—including those based on their religious beliefs—without fear of religious oppression or prejudice from outsiders. The majority of Mormon settlers lived in what they called the "City of the Saints," today known as Salt Lake City. Others moved into the surrounding valleys in present-day Utah and Idaho.

For other Americans of faith, western expansion provided other opportunities. During this time, called the Second Great Awakening, the United States saw a surge in church membership and the emergence of new Protestant denominations. A central feature of this newfound religious fervor was evangelization: preaching the gospel and attempting to convert others to Christianity. Westward expansion presented unique opportunities for religious leaders to spread their reach beyond the East Coast, including by ministering to settlers and

establishing missions that sought to convert Native Americans.

Think Twice

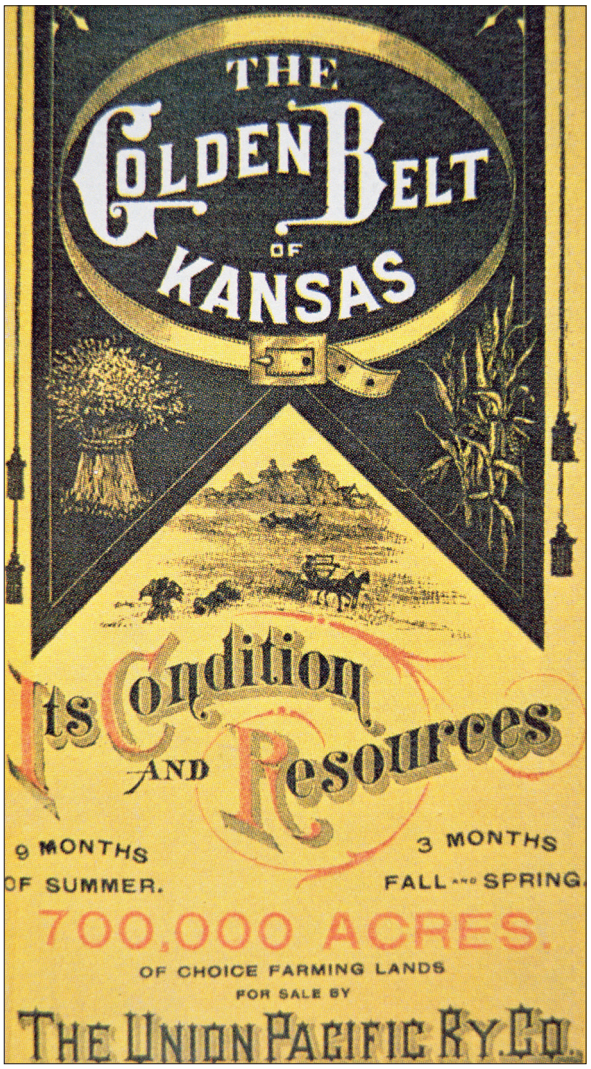
Why did Mormons and many Protestants migrate west?

Transportation and Communication Technology

Transportation and communication, like other aspects of American life, experienced significant change between the mid-1800s and early 1900s. As Americans pushed farther west, individuals, businesses, and government developed an urgent need to travel and communicate more efficiently. The expansion of railroads and the introduction of the telegraph met this need.

Railroads

During the 1830s and 1840s, hundreds of small railroad companies emerged, most operating rail lines that were only forty to fifty miles (65–80 km) long. In the 1850s, investors opened new railroad lines and acquired existing ones, giving rise to larger regional railroads. At the same time, the federal government was investigating the best location for a **transcontinental** railroad to connect the eastern part of the country with the rapidly developing



Railroads often sold portions of their land grants to settlers and business owners. There was an economic advantage to owning property directly on a railroad line.

West. Although Congress oversaw land surveys, the railroad was constructed by private companies.

This was a massive undertaking, and railroad companies were hesitant to embark on such an ambitious project on their own. Congress sought to remedy this by passing the Pacific Railway Act in 1862. This legislation

designated two companies to construct the transcontinental railroad. The Union Pacific Railroad Company would build from east to west starting in Omaha, Nebraska, the westernmost point of existing rail lines. Meanwhile, the Central Pacific Railroad would build from west to east starting in Sacramento, California. Eventually, the two companies would join the two lines. In total, the companies would need to lay track across 1,800 miles (2,900 km) to connect the Pacific coast to the rest of the country.

The Pacific Railway Act provided a variety of incentives to the two companies to

Statehood Expands West

The United States grew rapidly during the second half of the nineteenth century, with many western territories having sufficiently large populations to qualify for statehood. Congress admitted fifteen new states to the Union between 1850 and 1896: California (1850), Minnesota (1858), Oregon (1859), Kansas (1861), West Virginia (1863), Nevada (1864), Nebraska (1867), Colorado (1876), North Dakota (1889), South Dakota (1889), Montana (1889), Washington (1889), Idaho (1890), Wyoming (1890), and Utah (1896).

The completion of the transcontinental railroad was celebrated at Promontory Summit, Utah, on May 10, 1869. The two men shaking hands are the chief engineers of the Central Pacific and Union Pacific Railroads. Others pictured include railroad officials, politicians, and soldiers from the Twenty-First U.S. Infantry Regiment. While some railroad workers appear in the photo, Chinese laborers who constructed enormous swaths of the Central Pacific Railroad are notably excluded.

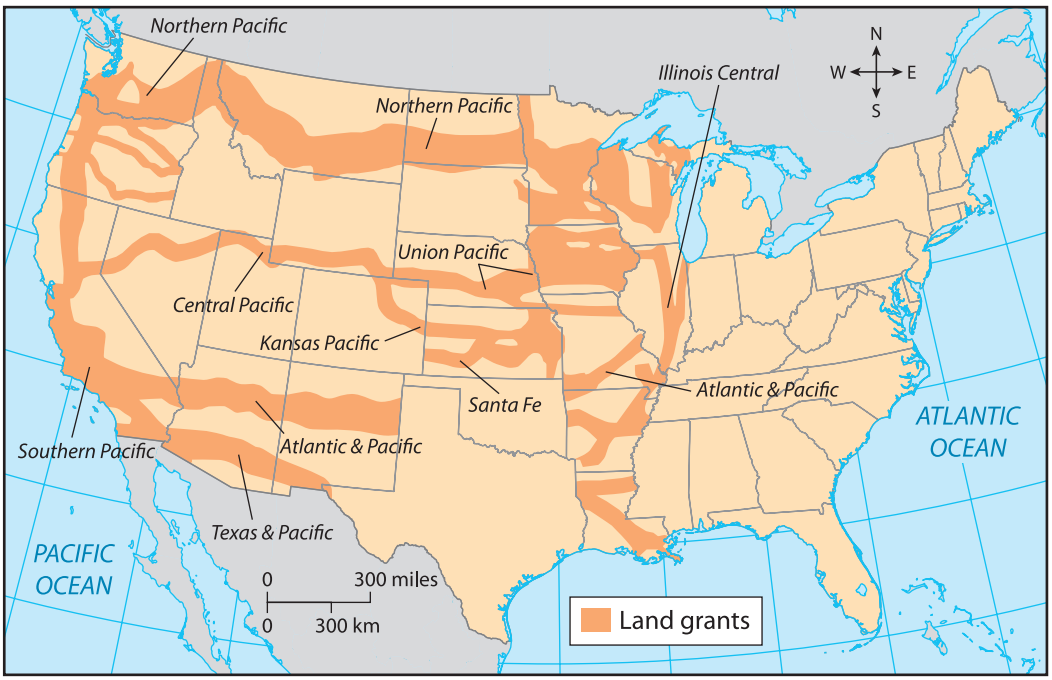
construct the transcontinental railroad. First, the federal government awarded each company **bonds** to pay for the construction. Second, the federal government gave each company land grants; for each mile of track they laid, the companies would receive ten square miles (26 sq km) of land alongside the track. The railroad companies could use the land for building—for example, constructing maintenance yards to help service trains. Alternatively, the companies could choose to sell the land. After the transcontinental railroad was completed, land near the tracks would likely grow in value, and companies could turn a profit from the sale.

Construction did not pick up in earnest until 1865. It demanded an enormous amount of labor in all kinds of weather conditions, and both companies hired thousands of workers. Yet these workers were dependent on supplies for construction, much of which had to be shipped from the East.

Most workers on the Central Pacific Railroad were Chinese immigrants, many of whom had originally come to California during the Gold Rush. Instead of striking it rich in the gold fields, they endured harsh and dangerous labor, often working twelve-hour days, six days a week.

Meanwhile, the Union Pacific line hired mostly Irish immigrants. The company also

Land Grants to Railroad Companies, 1800s



Over time, companies other than Union Pacific and Central Pacific invested in transcontinental lines, many of which also benefited from land grants from the U.S. government.

Time Zones

Have you ever driven or flown so far east or so far west that you had to change your clock? If so, you have the railroads to thank. Up until the late nineteenth century, time zones were set locally. Towns and cities set their clocks based on the position of the sun, resulting in more than a hundred different time zones across the country. Such imprecise timekeeping posed a problem for the railroads. Some railroads followed the time zone in the city where they were based, while others followed the time zones of major cities their railroads serviced. That meant that each railroad, even those passing through the same station, kept a different time. This made it particularly difficult for passengers to know when their train was leaving or arriving, even in stations that kept time with multiple clocks.

The first proposal for standardized time zones came in 1870. However, railroad companies did not debate the issue in earnest until 1881. Fearing the government would impose its own form of standardized time, railroad companies across the country voted to adopt four standardized time zones in 1883. Railroad officials and newspapers convinced local leaders and the public to adopt the new time zones, which went into effect on November 18 of that year.

In 1918, standardized time zones became a federal matter with the passage of the Standard Time Act. The act charged the Interstate Commerce Commission with determining the boundaries of each time zone, though today's time zones largely reflect those established by railroad companies nearly 150 years ago.

employed African American, Latino, and Native American workers before adding Civil War veterans to its crews.

Construction of the transcontinental railroad took six years, with the two lines finally meeting at Promontory Summit, Utah, on May 10, 1869. The president of Central Pacific, Leland Stanford, had the honor of completing the railroad by driving a ceremonial golden spike into the last railroad tie. The completion of the transcontinental railroad proved transformative for the United States. A trip from New York City to San Francisco—a journey that would have previously taken months—could now be completed in just seven days. The railroad transported finished goods faster than ever and opened new markets for businesses across the United States. This was life-changing for farmers and ranchers who had settled on the Great Plains and farther west because they could now ship their crops and livestock farther than ever before. And the railroad did more than encourage interstate trade. It also enabled the export of American goods to international markets and brought

imported products from around the world to U.S. consumers.

Think Twice

How did completion of the transcontinental railroad impact the United States and western expansion?

Communication Technology

U.S. expansion from the Atlantic to the Pacific meant that people needed more efficient ways to communicate with each other across the country. Two major developments, the telegraph and Morse code, made this a reality.

In the 1830s, two teams of inventors—a British group made up of Sir William Fothergill Cooke and Sir Charles Wheatstone and an American group made up of Samuel Morse, Leonard Gale, and Alfred Vail—were granted patents for a telegraph machine. The technology worked by sending electrical signals from a transmitter through a wire that connected to a receiver. In 1835, Morse invented a code, named for him, that could be used to communicate messages using the electrical signals transmitted on the telegraph. By encoding all letters of the alphabet and the numbers zero through

By the final decade of the nineteenth century, Western Union had established more than twenty-one thousand telegraph offices. Telegraph operators could now send two signals at once—in each direction—on the same line.

nine as short taps (dots) and longer taps (dashes), a person could tap out a message at the transmitter that someone at the receiver could copy. The encoded message could then be translated into a readable language.

Telegraph companies emerged across the country, including the Western Union Telegraph Company. Founded in 1851, the company set up telegraph lines throughout the entire country within five years. The availability of transcontinental, and later intercontinental, lines made the telegraph an important means of long-distance communication in the nineteenth century.

Westward expansion coincided with and was spurred by the Second Industrial Revolution, a period of rapid technological innovation that fundamentally changed American life. People living in the West, like those in the East, needed manufactured goods, including clothing, tools, and construction materials such as steel. Growing demand for these goods fueled industrial growth in the East, leading to the expansion of factories in major cities such as Chicago, Pittsburgh, and New York. You will read more about these developments in the next topic.

Think Twice

How did settling the West impact communication technology?

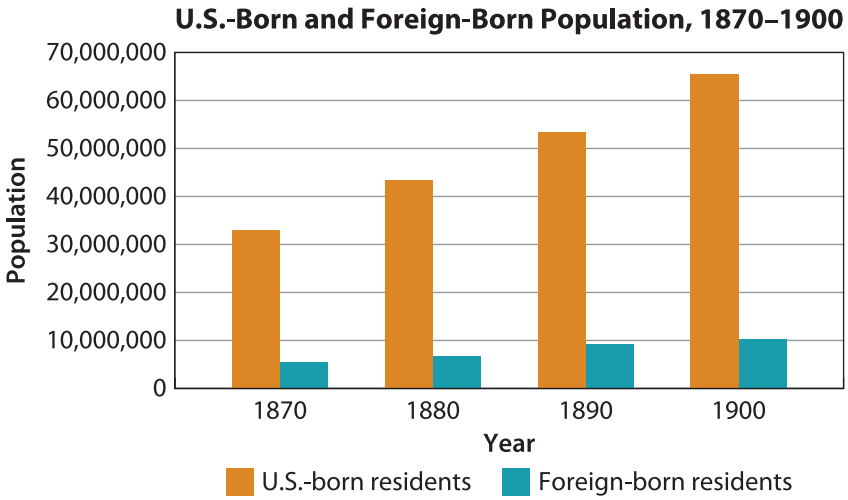
Immigration to the West

Following the Civil War, immigration to the United States surged, with approximately twenty-five million immigrants arriving on the eastern shore between 1865 and 1914 in search of new opportunities. While many of these people settled in major Northeastern and Midwestern cities, some groups—largely Germans and Scandinavians—journeyed farther west and settled on the Great Plains.

Though each person came to the United States for different reasons, the influence of friends and family already living in the country was quite common. Immigrants wrote letters to loved ones in their home countries describing life and opportunity in America, and many of these letters were published in local newspapers. As a result, distinctive immigrant communities began to develop throughout the western United States.

German and Scandinavian Immigration

The number of Germans immigrating to the United States every year spiked during the 1800s, growing from ten thousand people in 1832 to about two hundred thousand in 1854. Many of these immigrants had been farmers in Germany. They settled along the Mississippi, Missouri, and Ohio River valleys



Between 1870 and 1900, the total populations of both foreign-born residents and those born in the United States grew considerably.

and around the Great Lakes, then farther west later in the century.

Large-scale Swedish immigration began in the 1830s and 1840s and surged between 1861 and 1881. During this time, 150,000 Swedish immigrants came to the United States, two-thirds of whom arrived within a five-year span. They arrived on ships that docked at major cities on the East Coast; from there, they traveled inland to the Midwest. Other Scandinavian groups immigrated to the United States, too, including Norwegians and Danes.

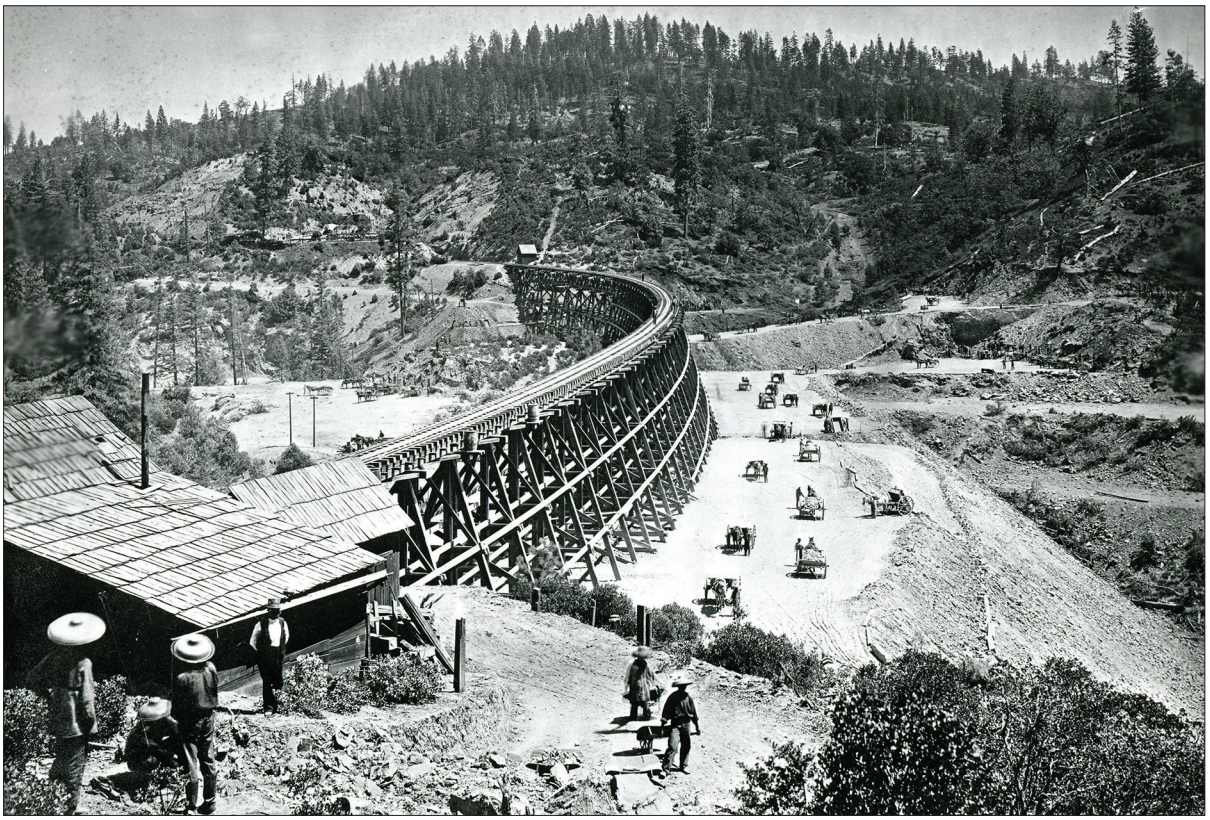
Many of these European immigrants were drawn to the United States by the positive reports of those who had immigrated earlier. Others were recruited by railroad companies and local governments to settle on the frontier, where they worked as farmers, miners, and railroad laborers. Some started their own businesses. Once settled, European immigrants had long-term social and cultural impacts on the Great Plains region, as well as the United States at large. For example, the first kindergarten in the United States was established by a German immigrant in the mid-1850s, and German immigrants led the push for universal public education. Scandinavian immigrants established more than a thousand newspapers and magazines that were read across the Great Plains and around the country. They also were active participants in later American social reform and labor movements.

Think Twice

Which factors encouraged German and Scandinavian immigrants to settle on the Great Plains?

Chinese Immigration

European peoples were not the only ones to immigrate to the United States during the



Many Chinese immigrants who came to the West Coast to mine for gold ultimately went to work on the railroad. This photo shows Chinese laborers working on a railroad trestle bridge in California in 1876.

second half of the nineteenth century. Many people immigrated from Asia, too, including people from China who had hoped to strike it rich during the California Gold Rush. While very few realized this dream, San Francisco became a major point of entry for Chinese immigrants arriving from mainland China and Hong Kong. By 1851, approximately twenty-five thousand Chinese immigrants, mostly from Guangdong (/gwang*dong/) Province, had arrived. Another twenty-five thousand followed by the end of 1852.

Chinese laborers faced significant obstacles finding work and earning a living in their new country. Unable to support themselves through mining, about ten thousand Chinese men went to work for the Central Pacific Railroad during the 1860s. This work was physically demanding and very dangerous, and the wages were low. Despite this, the opportunity to work on the transcontinental railroad was one that many Chinese immigrants felt they had to take. Some Chinese immigrants earned a living by starting their own businesses across the West. Many of these businesses were in Chinatowns, or neighborhoods with high concentrations of residents of Chinese descent.

Think Twice

What was the experience of many Chinese people who immigrated to the West Coast during the 1850s?

Challenges for Immigrants in the West

Beyond the basic struggles of starting a new life in a new land—finding work, a home, and a community—many immigrants frequently faced discrimination. During the 1840s and 1850s, the Know-Nothing movement formed in response to German and Irish immigration. Its members advanced anti-immigrant and anti-Catholic policies in the United States. The movement eventually dissolved, but **nativism** persisted, especially as the country became increasingly diverse. Nativists worried that the newcomers would not assimilate to American culture quickly enough, and they believed immigrants posed an economic threat by lowering wages and taking jobs from native-born Americans.

Nativist sentiment was especially strong against Chinese immigrants who settled in the West. They became the targets of discrimination, ridicule, robbery, and violence, with the perpetrators rarely seeing punishment for their actions.

But nativist sentiment was not just driven by individuals; it was also amplified by the actions of the local, state, and federal governments. Examples of such targeted laws included San Francisco's Sidewalk Ordinance of 1870 and the Queue Ordinance of 1873. The first prevented Chinese people from using a pole to carry their laundry and vegetables, while the second banned imprisoned Chinese men from wearing their hair in a long braid, a traditional hairstyle called a queue.

In 1882, Congress passed the Chinese Exclusion Act, which completely prohibited Chinese laborers from immigrating to the United States for a period of ten years. The law included provisions for non-laborers, such as diplomats, to enter the country. However, this group required special documentation, and the law still made it difficult for them to immigrate. The act also had consequences for people of Chinese descent already living in the United States—those who left the United States had a difficult time returning. In 1892, the Geary Act extended the Chinese Exclusion Act for another ten years. The act was extended indefinitely in 1902 and continued until 1943.

Think Twice

How did the local, state, and federal governments encourage and reflect nativism?

Effects of Expansion on Native Americans

Westward expansion had a significant and overwhelmingly negative impact on Native American populations, from how settlers claimed land already in use by Indigenous peoples to their treatment of and attitude toward them. During the latter half of the nineteenth century, the U.S. government pursued two major strategies to control Native Americans: forced relocation and cultural assimilation.

In 1851, Congress passed the Indian Appropriations Act. This established **reservations** where Native Americans were expected—and often forced—to relocate. These reservations were often far from ancestral lands, where generations of Native Americans had lived, hunted, and been buried. Tribes lost access to traditional hunting grounds, and the land on many reservations was harsh and barren. Drought and insects made it difficult to grow food.

Many reservations were formed through treaties negotiated between tribes and the government. While the treaties promised subsistence to Native Americans—meaning that they would not be denied opportunities to maintain their traditional ways of life, including how they hunted and gathered food—the federal government frequently failed to deliver on its promises.

The U.S. government also tried to force Native Americans to adopt mainstream American practices through assimilation, which took many forms. One method involved passing legislation that affected Native American landownership; you will learn about that shortly. Another practice forcibly separated younger Native

At assimilation-focused schools such as the Carlisle Indian Industrial School, students were barred from speaking in their native languages, forced to cut their hair, and made to wear an "American" style of clothing.

Americans from their traditional cultures and homelands. Many Native American children were sent to schools, such as the Carlisle Indian Industrial School in Pennsylvania, where they were prohibited from speaking their native language or practicing their religion. Breaking these rules often resulted in severe punishments. The children were taught English and vocational skills to help them integrate into mainstream American culture. Many Americans believed that assimilation was the best option for the survival of the country's Native population and therefore turned a blind eye to the culturally detrimental effects the schools wrought.

Think Twice

What was the purpose of the Indian Appropriations Act passed in 1851?

Intrusions on Native American Ways of Life

The arrival of newcomers in their traditional homelands had life-changing effects on Native American nations. While many Native nations experienced similar hardships, the effects of expansion varied by region and tribe.

Historically, the Lakota people traveled across the Great Plains as they followed bison herds following a long-established Indigenous tradition of communal land use. Different concepts of landownership, ushered in by western settlers and the transcontinental railroad, meant that the Lakota no longer had the unrestricted ability to roam. For the Cheyenne people, the arrival of settlers and the railroad disrupted their trade-based economy, forcing them to rely on government rations and, in some cases, raiding rival tribes to survive. Meanwhile, many Pawnee people went to work for the railroad as scouts, marking the shift to wage labor, an economic concept that did not exist in traditional Native American economies.

The construction of railroads also posed other problems for Native Americans. The government frequently gave Native American lands to railroad companies in the form of land grants—often in direct violation of treaties with Native American peoples. To then protect the railroads and federal interests, the U.S. government would deploy the army and state militias. Trying to quell resistance, the U.S. government built forts, occupied Native American communities, and threatened food sources. This often resulted in bloody conflicts between Native Americans, settlers, and soldiers.

The constant flow of settlers and expansion of the railroads presented yet another threat to Native Americans: the near extinction of the American bison. Native Americans on the Plains depended on bison for their survival;

Western settlement and the completion of the transcontinental railroad devastated bison populations on the Great Plains to the point of near extinction. This 1892 photograph shows a man standing atop a massive pile of bison skulls in Michigan.

the animal was a source of not only food but also clothing, shelter, and tools. After the U.S. government forced Native Americans to relocate from the East to the Great Plains in the first half of the nineteenth century, the number of people reliant on the bison for their survival grew, contributing to overhunting. But Native Americans were not the only ones hunting bison. Bison hides could be sold at a significant profit, leading white settlers to kill bison in the thousands. Americans also hunted bison for sport, shooting at herds from the windows of passing trains. In 1800, an estimated forty million bison roamed the Great Plains. By 1895, less than a hundred years later, there were fewer than a thousand bison in the United States.

Think Twice

How did the construction of the transcontinental railroad impact the Cheyenne compared to the Lakota?

Frontier Conflicts of the 1860s

Beginning in the 1860s, a series of clashes and wars erupted between Native Americans, white settlers, and U.S. soldiers. These conflicts were known as the Indian Wars. Though the causes of each individual conflict varied, the outcomes invariably resulted in greater restrictions on and further erosion of Native American ways of life.

One conflict during the mid-1800s is known as the Dakota War. The Eastern Dakota, a Sioux group from the Dakotas, northern Iowa, and western Minnesota, signed their first treaty ceding land to the United States in 1805, followed by additional treaties from 1837 to 1858 in exchange for food and money. As settlers encroached on their lands, the Dakota grew reliant on government payments, which stopped arriving during the Civil War. Tensions erupted in August 1862 when Dakota warriors, under Chief Little Crow, attacked settlements in Minnesota. Most of the state's troops were engaged in the Civil War. Governor Henry Sibley led a volunteer force that defeated the Dakota at the Battle of Wood Lake. Many Dakota fled, but others, including noncombatants, were captured. Nearly four hundred men were tried, often in brief proceedings, and most were sentenced to death. In November 1862, more than 1,600 Dakota—mostly women, children, and the elderly—were forced into a detention camp at Fort Snelling, where around 300 died that winter.

Sand Creek Massacre

Another devastating attack on Native Americans occurred in Denver, Colorado. In November 1864, rumors circulated that nearby Native Americans were responsible for the murder of a mining family. In response, the local community—including army colonel J. M. Chivington—called for revenge against what it called "hostile" tribes.

Some additional context is necessary to better understand the course of the events. Over the summer of 1864, Governor John Evans had issued a proclamation to Native Americans living in the Colorado Territory: "Friendly" Native Americans—those who were willing to live peacefully alongside settlers—should relocate to military posts for their protection. Native Americans who refused the proclamation would be considered "unfriendly" and subject to attack.

A group of Arapaho, led by Left Hand, and two groups of Cheyenne, led by White Antelope and Black Kettle, voluntarily went to Fort Lyon, where they surrendered their weapons in exchange for supplies. Soon after, the army ordered the Native Americans to leave the fort. Under the advisement of Fort Lyon's army commander, Major Scott Anthony, the groups relocated to Sand Creek, about thirty-five miles (56 km) away.

Colonel Chivington, accompanied by several hundred soldiers, arrived at Fort Lyon on November 28, 1864. He intended to find the Native Americans accused of murdering the mining family. Chivington and his soldiers began the journey to Sand Creek with Major Anthony that evening. Chivington, Anthony, and the troops launched their attack on the Sand Creek camp at dawn the next day. Black Kettle had raised an American flag and a white flag of truce at the encampment, a sign that his group was peaceful and under the protection of the U.S. government. But if

Chivington saw these flags, he ignored them. He ordered his soldiers to attack. In just two hours, U.S. troops massacred more than two hundred Native Americans—mostly women, children, and infants.

Congress investigated the Sand Creek Massacre, ultimately finding that Chivington and his soldiers had murdered unsuspecting and defenseless Arapaho and Cheyenne. However, they were never held accountable for their unspeakable actions.

Navajo Long Walk

The U.S. government also forcibly removed the Navajo (Diné; /dih*neh/) people of the Southwest from their ancestral homelands. After the Mexican-American War, the Navajo (Diné) resisted efforts to displace them, leading to violent clashes with settlers moving to the area and the U.S. military. The Navajo (Diné), fearing for their survival, surrendered to the U.S. government's demands. Between 1863 and 1866, more than eight thousand tribe members were forced to walk more than three hundred miles (484 km) on foot to the Bosque Redondo Reservation in New Mexico. As many as two hundred people died during the two-month trek.

Think Twice

How did western expansion and the arrival of settlers impact Native American peoples in the 1860s?

U.S. soldiers treated the Navajo (Diné) harshly as they were forced to trek from their homelands to a reservation in New Mexico. Conditions on the march, now known as the Navajo Long Walk, were brutal. People were not permitted to rest and were subject to violent treatment by U.S. soldiers. Many who fell behind were shot.

Indian Appropriations Act of 1871 and the Dawes Act

The country's first president, George Washington, set the precedent that Native Americans were sovereign, meaning they had the inherent right to govern themselves. As such, the U.S. government engaged in diplomatic relations with Native Americans just as they would any other country around the world—including negotiating treaties.

As you have read throughout this topic, during the 1800s, the policy of treaty-making with Native Americans had proven beneficial to the federal government because it was a legal way for them to gain control over tribal lands for western settlement. To that end, Congress ratified fifty-nine Native American treaties during the 1860s alone.

But not everyone agreed that the government should negotiate treaties with Native Americans, and opposition to the practice gained momentum as the nineteenth century progressed. Opponents argued that Native Americans were inferior to their white counterparts and that they were not actually sovereign nations but dependents of the U.S. government. At the same time, western settlers—and by extension, their elected leaders—pushed for the further removal of Native Americans to reservations.

Opponents of treaty-making succeeded with the passage of the Indian Appropriations Act of 1871. While the primary purpose of the act was to allocate lands and resources for Native American peoples, it also included the following provision:

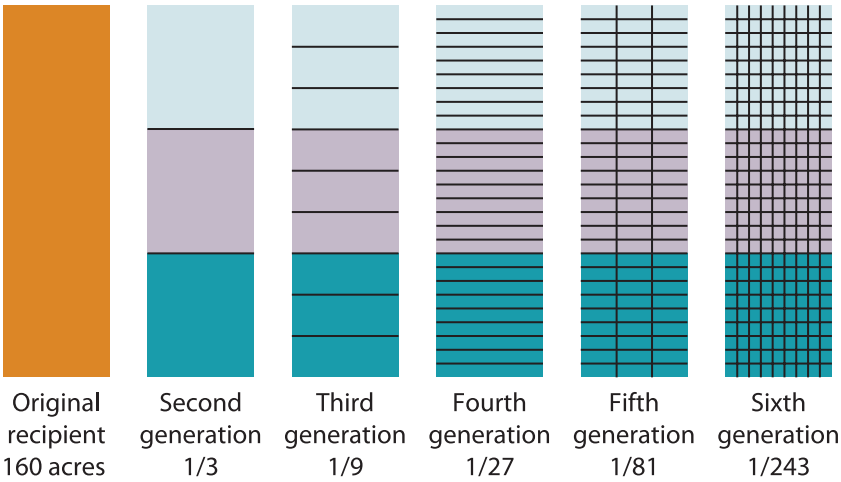
> Hereafter no Indian nation or tribe . . . shall be acknowledged or recognized as an independent nation, tribe, or power with whom the United States may contract by treaty.

In other words, while the U.S. government promised to uphold any treaty made with Native Americans between 1778 and 1868, it would not make any additional treaties with Native Americans in the future.

The Indian Appropriations Act of 1871 was disastrous for Native Americans. It marked a turning point in federal policy, ending formal nation-to-nation relations and accelerating efforts to assimilate Native peoples into U.S. society. It stripped Native Americans of the legal recognition of tribal sovereignty and tilted the balance of power toward the U.S. government. It also opened the door to policies that broke up tribal landownership and forced Native Americans into assimilation programs.

Following the 1871 act, Congress continued its assimilation policies. In 1887, it passed the General Allotment Act, also known as the Dawes Act. Its goal was to force Native Americans to assimilate into mainstream

Generational Impacts of the Dawes Act



The Dawes Act undermined traditional Native American systems of land use and landownership by breaking up tribal lands into smaller, individual allotments. This graph shows the effects of the allotment system from one generation to the next, assuming only three heirs per person per generation—which was not always the case.

American culture by "Americanizing" their concept of landownership. The act enabled the federal government to break up tribal lands into smaller, individual allotments, thus undermining traditional Native American concepts of communal land use in favor of individual landownership. Government officials hoped the Dawes Act would encourage Native Americans to take up agriculture and abandon their traditional ways of life. At the same time, the act also allowed the government to sell tribal lands to settlers as long as it was not already allotted to Native American individuals or families.

The effects of the Dawes Act were overwhelmingly negative for Native Americans. First, the concept of dividing land into individually owned plots conflicted with many Native American traditions of communal land use and stewardship. Plains tribes hunted bison freely across the Great Plains, while tribes that farmed did so communally. Second, the federal government typically allotted land to Native homesteaders that was unsuitable for use, with poor-quality soil that made crop yields difficult. Furthermore, many Native Americans had not been trained in U.S. agricultural methods, and the federal government provided no education or subsidies for equipment, supplies, and seeds. The allotments ranged from 40 to 320 acres (0.16–1.3 sq km). Because the land was often unfarmable, many Native Americans chose to sell their land to settlers, resulting in the loss of millions of acres of land. In 1887, Native holdings were 138 million acres

(558,466 sq km); by 1924, this number was 48 million acres (194,249 sq km).

The Dawes Act undermined Native Americans' cultures and traditions. It forced them to adopt individualistic values over their traditional communal ways of life, weakening their sense of cultural identity. It also undermined tribal governance and traditional leadership structures. Historically, Native Americans chose their own leaders and governed themselves. While tribal leadership still existed, Native Americans were now forced into legal relationships with federal and

PRIMARY SOURCE: DAWES ACT, 1887

Named after its sponsor, Senator Henry Dawes of Massachusetts, the Dawes Act reflected his belief that private landownership would "civilize" Native Americans. Its provisions remained in effect until 1934, when the Indian Reorganization Act ended the federal policy of allotments.

An act to provide for the allotment [allocation] of lands in severalty [separation] to Indians on the various reservations, and to extend the protection of the laws of the United States and the Territories over the Indians, and for other purposes.

Be it enacted by the Senate and House of Representatives of the United States of America in Congress assembled, That in all cases where any tribe or band of Indians has been, or shall hereafter be, located upon any reservation created for their use, either by treaty stipulation or by virtue of an act of Congress or executive order setting apart the same for their use, the President of the United States be, and he hereby is, authorized, whenever in his opinion any reservation or any part thereof of such Indians is advantageous for agricultural and grazing purposes, to cause said reservation, or any part thereof, to be surveyed, or resurveyed if necessary, and to allot the lands in said reservation in severalty to any Indian located thereon in quantities as follows:

To each head of a family, one-quarter of a section;

To each single person over eighteen years of age, one-eighth of a section;

To each orphan child under eighteen years of age, one-eighth of a section; and

To each other single person under eighteen years now living, or who may be born prior to the date of the order of the President directing an allotment of the lands embraced in any reservation, one-sixteenth of a section.

Source: An Act to Provide for the Allotment of Lands in Severalty to Indians on the Various Reservations. Pub. L. No. 49–105, 24 Stat. 388 (1887).

state governments and became subject to those jurisdictions.

Think Twice

How did the treatment of Native Americans by the federal government during the late nineteenth century compare to the Native American policies of the Jacksonian era?

Native American Resistance in the Late 1800s

By the end of the 1800s, relations between Native Americans, settlers, and the U.S. government remained fraught with violence, broken promises, and displacement. Native communities across the Midwest and West continued to resist U.S. expansion and defend their lands. Although Native American groups won key battles against U.S. forces, they ultimately faced overwhelming American military might and governmental policies aimed at removing them from their lands and suppressing their traditional ways of life.

The Little Bighorn

The reservation system failed to prevent conflicts over Native American land rights and growing settler encroachment in the West, as was the case in South Dakota in the 1870s. The Sioux people had signed the Second Treaty of Fort Laramie in 1868, which guaranteed their reservation in the Black Hills. But six years later, gold was discovered in the Black Hills. A flood of miners and prospectors suddenly arrived in the area. At the same time, some Native Americans left the confines of the Sioux reservation to hunt in the surrounding area, which was allowed by the treaty. The U.S. government responded by sending army troops—led by General George F. Crook, General Alfred H. Terry, and Lieutenant Colonel George A. Custer—to intimidate the Sioux and "protect" the miners and prospectors.

Sioux leaders recognized that the troops would prioritize the land claims of the new settlers over the terms of the treaty. The Sioux, led by Chiefs Crazy Horse and Sitting Bull, were prepared to defend their tribal lands and their traditional way of life. In June 1876, Sioux warriors surprised and defeated General Crook's troops at the Battle of the Rosebud, fought at Rosebud Creek in southeastern Montana Territory.

The Battle of the Rosebud was just the beginning. Later that month, on June 25, Lieutenant Colonel Custer's regiment spotted a band of Sioux and Cheyenne warriors along the Little Bighorn River. The army leaders planned a two-pronged attack on the warriors, with Custer leading one column and General Terry leading another. However, Terry's column was a few days behind Custer's, and the lieutenant colonel was impatient to attack. Custer did not realize that the Sioux and Cheyenne had assembled one of the largest Native American fighting forces ever seen on the Great Plains. During a single hour of battle,

Native American warriors killed Custer and all two hundred of his troops. The only survivor was a horse named Comanche.

Americans were stunned by Custer's defeat at the Little Bighorn and demanded the U.S. government send more troops. But the Sioux would not be defeated so easily. They continued to win battle after battle against the U.S. troops. Despite these successes, the Sioux could not withstand the federal government's military force, economic pressure, and settler encroachment. The influx of settlers and the destruction of the bison population increased the threat of starvation, leading many Sioux to surrender over time.

Chief Sitting Bull and his remaining followers relocated to Canada in May 1877. However, the Canadian government forced them to return to the United States four years later. While the U.S. government guaranteed **amnesty** for Sitting Bull's people, the Sioux leader was imprisoned for two years for killing American soldiers and for his role as leader of the Sioux resistance. He eventually returned to the Sioux reservation.

Think Twice

What factors contributed to the Battle of the Little Bighorn?

The Ghost Dance and Wounded Knee

In 1889, Wovoka, a Paiute (/pie*oot/) leader in present-day western Nevada, had a vision that would have a ripple effect across Native American communities in the West. In his vision, Wovoka was shown a dance that, if performed by Native Americans, could reunite them with ancestors on their tribal lands, bring back the bison, and send the settlers back east. This dance came to be known as the Ghost Dance.

Other Native American leaders traveled to hear Wovoka and learn the Ghost Dance. They then carried his message and the dance back to their own people. Soon, tribes across the Great Plains had embraced the Ghost Dance, with some groups performing the ritual nightly.

While the Ghost Dance brought hope to Native Americans, it frightened settlers, who worried the ritual dancing was a sign of an impending uprising. This led U.S. officials and Bureau of Indian Affairs agents to attempt to ban the Ghost Dance in the Dakota Territory. But Native Americans persisted, and army troops were brought in to enforce the ban. A Bureau of Indian Affairs agent suspected that Sitting Bull was behind the resistance, and the agency sent police to arrest him. Fighting ensued, and Sitting Bull was killed. The Bureau of Indian Affairs next set its sights on Sitting Bull's half brother, Chief Big Foot.

Chief Big Foot, a leader of the Ghost Dancers, fled to the Pine Ridge Reservation in South Dakota with a group of followers—106 warriors and about 250 women and children.

Native Americans across the Great Plains performed the Ghost Dance.

A force of about five hundred U.S. soldiers led by General Nelson A. Miles caught up to the Sioux on December 28, 1890. At this time, Big Foot was sick, and he realized his small group of warriors was no match for the much larger American force. He agreed to lead his followers to Wounded Knee Creek, where they would surrender their weapons and relocate to the reservation.

On December 29, Miles's soldiers searched the camp for firearms, collecting several dozen rifles from the few Sioux who complied. Many of the Sioux held blankets around their shoulders to protect themselves from the cold. When the soldiers asked the Sioux to open their blankets, a young warrior named Black Coyote revealed his rifle and declared he would not surrender it. The rifle ultimately fired as the soldiers tried to wrest it from him. The soldiers, fearful of being killed, opened fire on the Sioux, using cannons as well as rifles. Fifty Sioux were wounded and three hundred more were killed, Big Foot among them. The army suffered far fewer losses, with thirty-nine wounded and twenty-five dead; many of these casualties were the result of "friendly crossfire" when soldiers firing at the Sioux inadvertently hit one another.

Native Americans continued to fight U.S. troops on the frontier, though sporadically and to a much lesser degree. The Wounded Knee Massacre marked the end of the U.S. military's large-scale campaigns against Native Americans in the nineteenth century.

Think Twice

Why was Wovoka's vision significant?

The Nez Percé War

Earlier in the topic, you read about how settlers traveled along the Oregon Trail. In 1848, people began moving to the Oregon Territory at a rapid pace. Seven years later, the Nez Percé and other local tribes met with the territorial governor about the ongoing incursion into their lands. Through the Treaty of 1855, the tribes gave the U.S. government 7.5 million acres (30,351 sq km) of their land while maintaining rights to their traditional fishing and hunting grounds.

An event now familiar to you took place in 1860: Gold was discovered in the region. Instead of preventing prospectors from intruding on the tribes' lands, the government forced a new treaty. This agreement claimed another five million acres (20,234 sq km) of the tribes' lands, reducing the size of their reservation by 90 percent. The treaty was signed by just fifty-one tribal representatives, many of whom did not speak for all Nez Percé bands, particularly those who did not live within the boundaries of the now-smaller reservation. Many left the negotiations in protest. The treaty was ultimately ratified in 1867.

Then in 1877, the U.S. government ordered Chief Joseph, the leader of the Nez Percé, to relocate his people to a reservation. Infuriated by the government's edict, three young warriors retaliated by killing several white settlers, an act that inspired other Nez Percé to follow their lead. The U.S. Army pursued the Nez Percé through rugged terrain across Idaho, Wyoming, and Montana as the tribe conducted a skillful monthslong retreat that repeatedly outmaneuvered the military. Led by Chief Joseph, nearly eight hundred men, women, and children traveled more than a thousand miles (1,609 km) across four states in the hope of reaching Canada. Ultimately, the U.S. Army apprehended them before they could reach their destination. Chief Joseph agreed to surrender, and the Nez Percé were forced to resettle on different reservations across the Northwest. At the surrender, Chief Joseph famously declared, "I will fight no more forever." The Nez Percé War resulted in hundreds of Native American deaths.

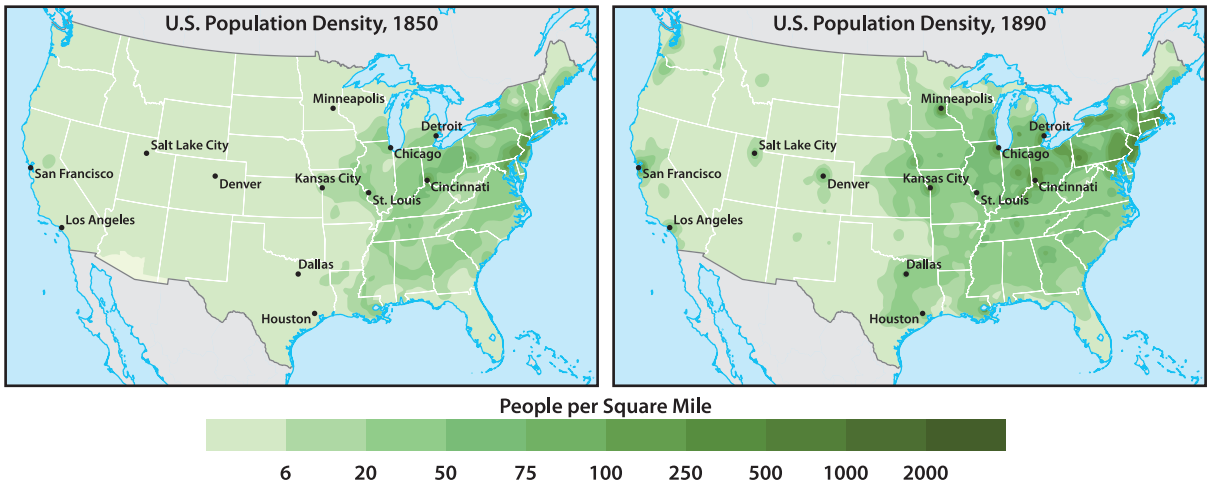
Think Twice

How was the cause of the Nez Percé War similar to the cause of the Battle of the Little Bighorn?

A Changed Frontier

The era of westward expansion could not, and did not, last forever. By 1890, westward settlement had progressed to such an extent that the superintendent of the U.S. Census declared, "There can hardly be said to be a frontier line." In effect, the frontier was no longer a frontier—it was a settled, populated region. Although

"Closing" the Frontier, 1850–90



These maps show the shifting population density of the United States over the second half of the nineteenth century as well as the growth of major cities far west of the major population centers of the early 1800s.

migration to the Midwest and West continued into the twentieth century, the romance of the "Wild West" faded into memory.

The second half of the nineteenth century was a time of immense change for the United States. But western settlement was just one of many factors driving the country's evolution.

After the Civil War, new inventions and innovations transformed where people lived and how they worked. As you will read next, just as the promise of land drew immigrants to settle in the West, new opportunities in America's cities encouraged millions more people to seek their fortunes—for better or for worse.

Topic 2
Industrialization, Immigration, and Urbanization

Framing Question

What were the consequences of industrialization for the United States during the late nineteenth and early twentieth centuries?

Samuel Clemens—better known by his pen name, Mark Twain, the author of *The Adventures of Tom Sawyer* and *Adventures of Huckleberry Finn*—used satire to comment on life and wealth in the United States during the late nineteenth century. Among the statements attributed to him is "I am opposed to millionaires, but it would be dangerous to offer me the position."

A Gilded Age

Setting the Scene

In a comfortable study, Mark Twain dips the nib of his pen in ink and begins to put words on the page. "How my heart goes out in sympathy to you!" the author writes, a strong opening to a seemingly warm correspondence. Twain laments the recipient's lack of meaningful friendships, then continues: "You are an old man," he explains, "and ought to have some rest, and yet you have to struggle and struggle, and deny yourself, and rob yourself of restful sleep and peace of mind, because you need money so badly."

Without context, the excerpts from the letter may be read as kind—yet that is certainly not the case. The year is 1869, and Mark Twain is writing an essay, an open letter meant for the masses, to the richest man in the United States, industrialist Cornelius Vanderbilt. Twain's assessment of Vanderbilt is deeply sarcastic. His "letter" is a withering depiction of a man who is surrounded by "subjects," people who only adore him for his power and fortune. With his pen, Twain paints Vanderbilt as a man whose insatiable desire to accumulate wealth comes at the expense of those around him.

Historians will later be unable to confirm whether Vanderbilt read Twain's essay. Yet any lack of response from the industrialist certainly will not deter Twain from sharing his adept social commentaries in the future. Four years later, in 1873, he will coin a nickname for the late nineteenth century, the Gilded Age, when he coauthors a book with that title in which he satirizes life in the United States in the post–Civil War era. The nickname will present a profound metaphor about life during this period: While people such as Vanderbilt enjoy their immense wealth, "gilding" the late 1800s with a shiny veneer of comfort and success, many other Americans struggle in the background of everyday life to make ends meet.

The Second Industrial Revolution

As you read in the previous topic, the United States underwent significant growth and expansion during the latter half of the nineteenth century—and not only in the West. The population of the country began growing rapidly in the mid-century. In 1850, the total U.S. population was about 23.2 million people. By 1860, this number had grown to 31.4 million, and by 1890, the 1860 figure had doubled to 62.9 million people. There were now more people spread out over more land—and with more diverse economic needs—than ever before. In 1860, many people still lived in rural areas and made a living farming the land. By 1890, the nation's cities had grown massively as people flocked to work in new and expanding factories based in cities. In this period, population growth meant economic growth and transformation as well as a different relationship between people and the land.

The seeds of American **industrialization** were first planted overseas, in Great Britain. During the 1700s, British inventors developed new technologies that reduced production time and costs—and, by extension, increased British profits in the textile trade. These new technologies eventually made their way across the Atlantic to the New England textile industry in the late 1700s. By the 1830s, industrialization had expanded to other areas, including mechanized flour mills and lumber mills. Factories relied heavily on people, not just machinery; even with new and improved machines, workers still produced shoes, kitchenware, and other goods mostly by hand.

The rapid developments of the First Industrial Revolution had slowed by the middle of the nineteenth century. Then, starting around 1870, another wave of rapid change began, which historians call the Second Industrial Revolution. This new industrialization was powered by innovative developments in technology. For example, new methods of refining steel made it easier to create materials to build railways. Research into fossil fuels provided new energy sources.

From about 1870 to 1914, industrialization around the world accelerated. It was accompanied by unprecedented changes in how and where Americans lived. New factories that took advantage of the new technologies were based in cities, and they needed workers. Encouraged by the offer of paid work in industry, many people chose to move from rural areas to cities, a process called **urbanization**. New York City is a prime example of this: In 1860, the population of the city was 813,660; by 1900, it was 3.4 million.

The new urban population included many immigrants. There were many reasons why people left their homes to travel to the

United States at this time. Some were fleeing persecution or warfare in their countries of origin. Others hoped to escape poverty. When immigrants arrived in the United States, they settled in cities and sought work in the country's increasingly industrial economy.

Think Twice

Why did U.S cities experience significant population growth in the decades after the Civil War, and where did people moving into the cities come from?

Enabling Industrialization

The United States industrialized rapidly after the Civil War for many reasons, including the character of the American economy at the time. The United States is often characterized as a capitalist or free-market economy. **Capitalism** refers to *capital*, or the money, land, resources, facilities, and other assets an individual or business controls and uses. Under capitalism, private individuals and businesses control capital and decide how it should be used. Individuals and businesses seek to use their capital to produce products to sell for more money than they cost to produce—the definition of *profit*. In a capitalist system, it is individuals and businesses, rather than the government, that make most decisions about what is produced and how it is sold. Prices are determined by the desirability of products, the quality of which is influenced by competition between different producers. This spurs creativity and encourages innovation. Capitalism differs from **socialism**, a system in which the government owns and controls the major industries in the interest of distributing wealth more evenly across society.

Karl Marx

The ideas within socialism originate with Karl Marx, who was born in Prussia (Germany) in 1818. A student of philosophy and a later revolutionary, Marx wrote a pamphlet titled *The Communist Manifesto* with Friedrich Engels in the late 1840s. In it, Marx and Engels critique the capitalist system using the concept of class struggle, arguing that society is divided into two classes: the bourgeoisie, who own the means of production, and the proletariat, who sell their labor. According to Marx and Engels, capitalism inherently leads to exploitation. Marx foresaw a time when the proletariat would rebel and ultimately create a communist society in which the means of production would be collectively owned and private property would cease to exist.

Both socialism and **communism** reject the economic freedoms within capitalism. As you will learn, the differences between U.S. capitalism and the socialist and communist principles of other national governments would produce conflicts throughout the twentieth century.

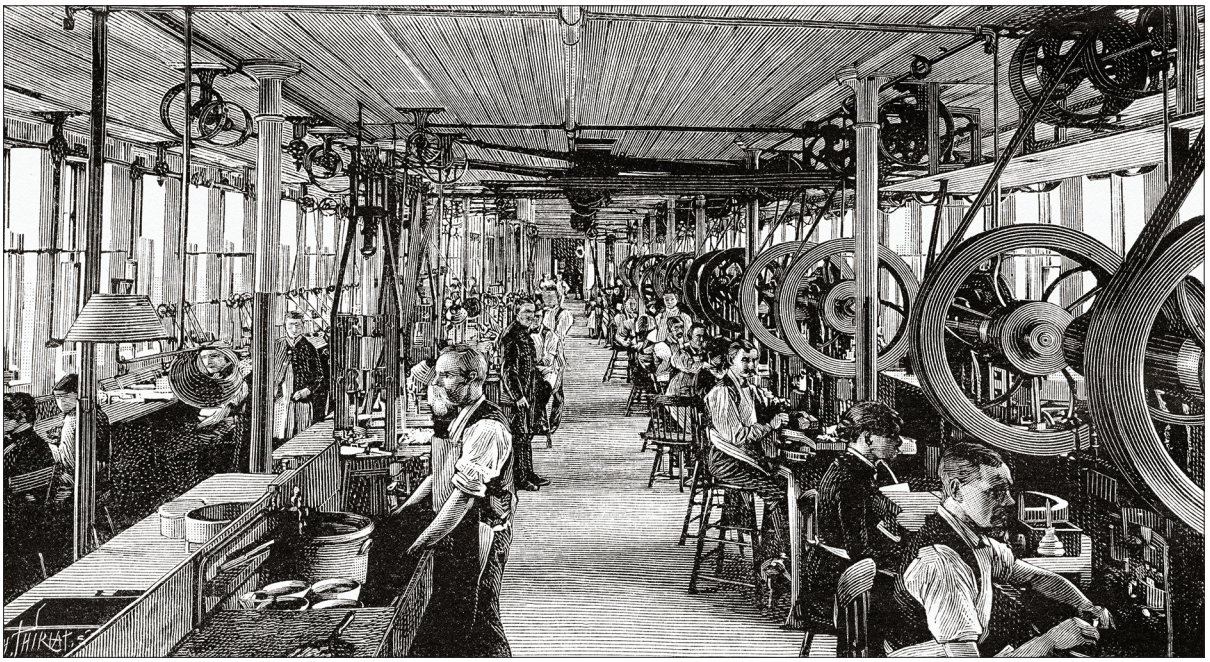
During the 1800s and early 1900s, the U.S. government favored the laissez-faire approach that you first learned about in Unit 1. As a result, businesses and **entrepreneurs** operated largely uninhibited, with few regulations or laws concerning the protection and treatment of workers, pricing, or quality guarantees. This would start to shift during the late 1800s due to the efforts of organized labor, which you will read more about later in this topic.

The Second Industrial Revolution rapidly progressed as technology continued to improve, making the machines used in factories more effective. For example, as manufacturers increasingly relied on machines for production, they needed a way to repair these machines and other equipment. So another innovation emerged: interchangeable parts. Unlike their handmade predecessors—and as the name suggests—interchangeable parts were identical and used in a variety of applications, from muskets to automobiles. The machines that produced the interchangeable parts made the same part in the same shape and size, again and again. This made assembling the parts easier, and it also made it simpler to repair or replace them when they broke.

Innovations in materials and energy also played a role in industrialization. In the 1850s, English inventor Sir Henry Bessemer patented a process in Britain for removing impurities from molten pig iron—a key ingredient used to make steel—by blasting compressed air through it. The Bessemer process made steel production faster, more efficient, and less expensive. This led to the mass production of steel, which was used across the United States in railroads, factories, and buildings, including the country's first skyscrapers.

The Bessemer process revolutionized the global steel industry. Between 1880 and 1890, steel production in the United States increased an astonishing 290 percent.

Oil, like steel, was essential to industrialization. Initially, crude oil was collected from areas where it naturally seeped up through the ground. This changed in 1859 when the first oil wells, which could extract oil from deep



Over time, factories adopted practices to increase efficiency and speed up production, including the division of labor. This illustration shows workers at different tasks in a cutting shop in Massachusetts, where textiles were cut according to patterns to be made into garments.

underground, were drilled in the United States, in Titusville, Pennsylvania, making oil a more widely available resource that could be used in industry and in homes. Meanwhile, improvements to the oil refining process meant that the crude oil could be separated into kerosene, lubricants, and other sources of fuel. Kerosene production was an especially useful development at this time; it offered a less expensive alternative to other fuels used in oil lamps, such as whale oil, coal oil, lard oil, and alcohol-based fuels.

An increase in the understanding and use of electricity also contributed to industrial expansion. Thomas Edison opened the first electric power plant in 1882 in New York City. Gradually, power stations and wires brought electric power to homes and businesses in major cities. Now, electric lights, not gas lanterns, lit the way for pedestrians and vehicles on city streets. Nikola Tesla's work with alternating currents led to the use of electric motors in factory machinery.

Changes were not only driven by technology, energy, and materials. New forms of organization also enabled industrialization. Workers and factories were both concentrated in cities, which made production more efficient. Factory organization itself also changed. Manufacturers adopted and refined the division of labor and instituted assembly lines in their factories. Under a division of labor, workers specialize in performing a specific task instead of making all or a large

Taylorism

The owners and organizers of factories wanted to know how to get the most profit out of their businesses. They wanted to make as much as possible, as cheaply as possible, to sell to as many people as possible. To enable this, they turned to new ideas about how to organize workers. Frederick Taylor, an engineer and inventor, was a leading figure in this new field of scientific management. Often armed with a stopwatch, Taylor closely observed workers in factories to determine how to make their every individual movement more efficient. He looked for opportunities to either cut out certain movements altogether or optimize and then standardize them across workers. This was intended to make both workers and the processes they followed as efficient and productive as possible. Taylor also insisted that workers should be provided with the correct tools and given incentives for good performance. Taylor's ideas of scientific management, now dubbed *Taylorism*, contributed to mass production in manufacturing in the United States and globally.

part of a finished product themselves. In an assembly line, production—that is, the assembly—of an item is carried out by a line of workers, each performing a specialized task. When a worker finishes their task, they pass the item on to the next worker in the process. While the division of labor was not a new idea, the assembly line improved the way it was implemented.

Together, machinery, interchangeable parts, and assembly lines made it possible for manufacturers to produce a broader range of goods in less time. This was the birth of mass production: the rapid production of goods sold to consumers in great quantities.

Think Twice

How did technological innovations and the federal government's laissez-faire policies foster industrialization?

Railroads and Industrialization

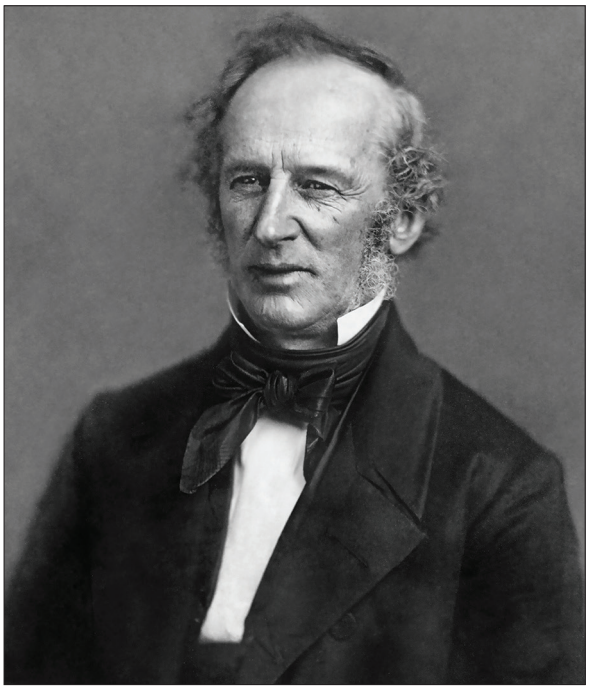
As you have learned, railroads were integral to American expansion during the 1800s. The patchwork of local lines in the first half of the nineteenth century, which covered only some of the country, was transformed into a national rail network following the passage of the Pacific Railway Act of 1862 and the completion of the first transcontinental railroad in 1869. By 1900, the country had another four transcontinental lines. The railroad lines crisscrossing the United States rocketed from forty-five thousand miles (72,420 km) of track in 1871 to almost two hundred thousand miles (321,900 km) of track by the end of the century.

Railroads advanced industrialization in a number of ways. Not only were they used for transporting **raw materials**, such as coal and iron ore, across the United States,

but railroads were also massive consumers of raw materials in their own right. By the early 1900s, more than half a million miners across the country were extracting upward of five hundred million tons of coal from the ground each year. A large amount of this coal was either used to fuel the nation's trains or delivered by trains directly to consumers. The railroad industry also boosted the steel, oil, and timber industries in a similar fashion.

Consumers and businesses also benefited from railroad expansion. Railroads made it quicker to transport finished goods to market. By virtue of its speed, efficiency, and improved convenience, the railroad industry helped increase competition and reduced prices for consumers by opening new markets for businesses around the country.

The railroads were instrumental in driving industrialization—and they also enabled railroad owners and investors to accumulate massive amounts of wealth, as was the case with Cornelius Vanderbilt. Vanderbilt was born in 1794 to a family of modest means. He dropped out of school at age eleven and borrowed money to buy a boat, which he used to ferry passengers between New York City and Staten Island. In 1829, Vanderbilt entered the steamship business, and he became a self-made millionaire by 1846. He later shifted his focus to railroads, and by strategically acquiring and consolidating key lines, he became the first to offer continuous rail service from New York City to Chicago.



At the time of his death in 1877, Cornelius Vanderbilt—the subject of Mark Twain's letter discussed at the beginning of this topic—was the wealthiest person in the United States.

Vanderbilt fundamentally changed American transportation, ensuring that his railroads were increasingly efficient, inexpensive, and fast. At the same time, those railroads made him fabulously wealthy; Vanderbilt was worth more than $100 million at the time of his death in 1877.

Think Twice

How did railroad expansion contribute to industrialization?

The Rise of Big Business

Vanderbilt was not the only industrialist to amass an immense fortune during the late 1800s and early 1900s. Other names

associated with the age include John D. Rockefeller and Andrew Carnegie. The growth of industry also meant the growth of profit and wealth for major business leaders, as the government's laissez-faire policies allowed already-big businesses to grow even bigger.

One way business leaders of the Gilded Age grew their wealth was by forming **corporations**. Although corporations had existed in the United States since the 1770s, they did not become widespread until the middle of the nineteenth century. Corporations offer several benefits to entrepreneurs and investors. Primarily, they are a means of managing risk and creating stability. They protect the financial interests of the corporation's owners should the business venture fail, so people can invest and take risks without fearing ruin. Corporations can also exist beyond the lives of their original owners. The use of the corporate structure helped industrialists, entrepreneurs, and investors as they poured unprecedented amounts of their own capital into new factories and business ventures during the Second Industrial Revolution.

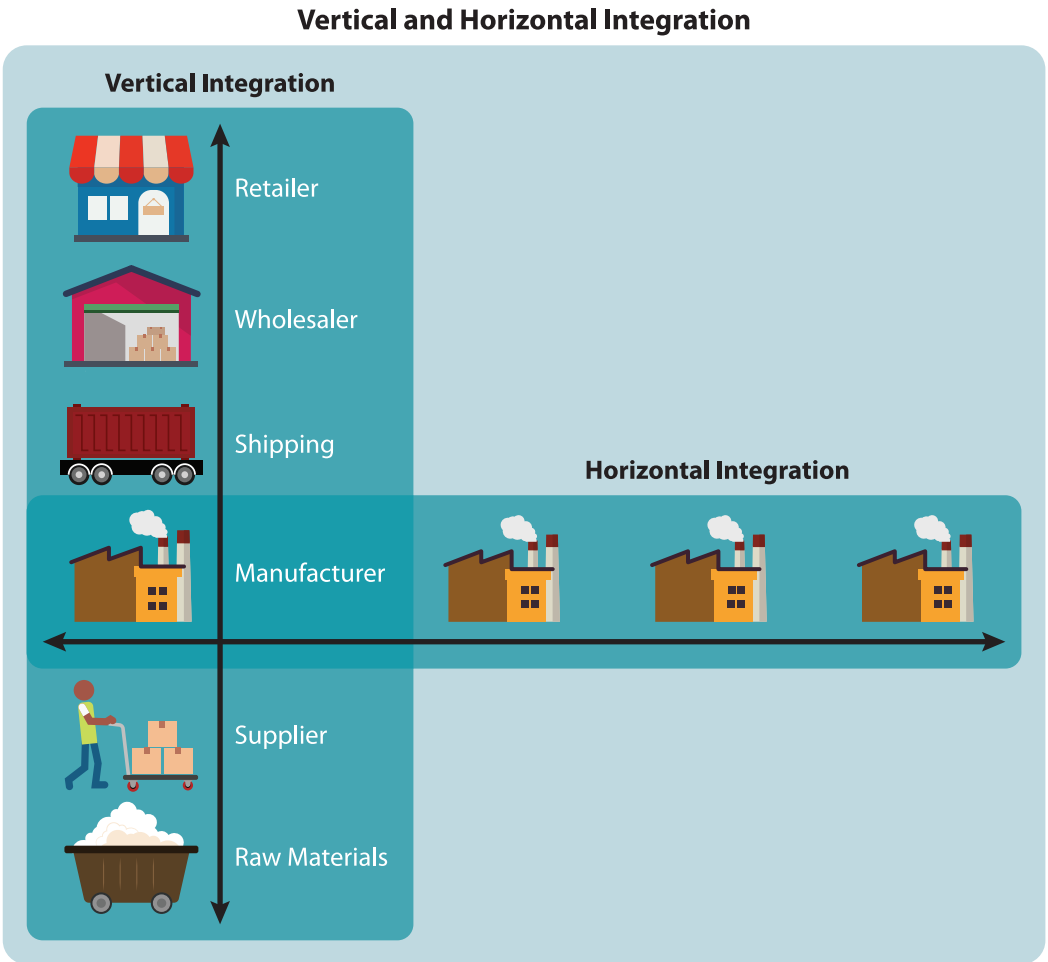
The owners and leaders of corporations then began expanding their power through the formation of **monopolies**. When a business has a monopoly, it supplies a resource, good, or service without competition. Normally, competition drives down costs and increases quality as businesses compete for customers. Consumers might be attracted to one product because of its low price or to another because of its higher quality. Without competition, however, monopolies can charge higher prices and make lower-quality products. Some business leaders of the late 1800s wanted to form monopolies so that they could set prices *and* control both production and the profits.

In this era, due to laissez-faire policies, huge monopolies were formed to control certain vital goods and resources. Monopolies may be formed through horizontal or vertical integration. Under horizontal integration, corporations work to control a single aspect of production across an entire industry. This was the case with John D. Rockefeller and Standard Oil.

Oil was, and is, used as a fuel and as a raw material. A monopoly on oil meant near-total control by one company of the supply of this vital resource. Businesses that needed oil had no choice but to buy from the monopoly supplier. Rockefeller first started building oil refineries in Ohio during the 1860s and later established a corporation, the Standard Oil Company, with other investors in 1870. Over time, Standard Oil evolved from a corporation to a **trust**, or a group of multiple corporations designed to reduce competition and control prices. Standard Oil built its monopoly through the 1880s by purchasing competing oil refineries, eventually giving Rockefeller control of

about 90 percent of the nation's oil refining capacity by 1890.

Unlike Rockefeller, who used horizontal integration, Andrew Carnegie used vertical integration to build a monopoly in the steel industry. Under vertical integration, businesses acquire and control every part of the supply chain, from the raw materials to the final product. Carnegie learned about the Bessemer process in 1872 and drew up plans to create his own plant to supply steel for the Pennsylvania Railroad. Carnegie and his new company established the Edgar Thomson Steel Works in Braddock, Pennsylvania, in 1873. After it went into operation in 1875, the steelworks began producing cheap steel, and Carnegie used the profits to buy other steel companies, which he formed into a new company called the Carnegie Steel Company in 1889. As time went on, Carnegie and his business partners sought still other ways to improve efficiency,



During the Second Industrial Revolution, industrialists used vertical and horizontal integration to create monopolies and reduce competition within their industries.

reduce production costs, and increase profits. Carnegie wanted to control all steps of steel production, from beginning to end. To achieve this, he bought the coal and iron mines that produced the raw materials needed to make steel. He also acquired the railroads that shipped raw materials and finished products to and from his mills; this meant he no longer had to pay the rates set by railroads. Carnegie's push for efficiency had mixed results. His efforts brought down the cost of steel, which in turn facilitated U.S. economic and industrial growth. But cheap steel often came at the expense of his workers, who worked long hours for low wages in unsafe conditions.

Whereas entrepreneurs such as Carnegie were especially adept at identifying universal needs within industries, entrepreneurial women of the time often made their money by identifying specific groups and their needs. Madam C. J. Walker was born on a sharecropping plantation in Louisiana in 1867. After starting to lose her hair during the 1890s, she was inspired to seek out different remedies, eventually leading her to establish a line of hair and beauty products that catered to African American women like herself. Walker grew her door-to-door sales business into the Madam C. J. Walker Manufacturing Company, which went on to employ more than forty thousand people. Due to the success of her business, Walker became one of the wealthiest African American women of her era.

Inventor and marketer Lydia Pinkham also went on to build an empire by catering to a specific need. In 1873, a financial panic spelled disaster for the Pinkham family. With her husband's business on the brink of collapse, Pinkham took matters into her own hands and began marketing an herbal health remedy designed to address a range of women's health issues. Aided by her children, she marketed Lydia E. Pinkham's

Lydia Pinkham marketed her product across the United States. This trade card, printed around 1880, emphasizes the homegrown nature of her herbal remedy, something she predicted would appeal to her target market.

Vegetable Compound across the country and expanded production from her home kitchen to a laboratory.

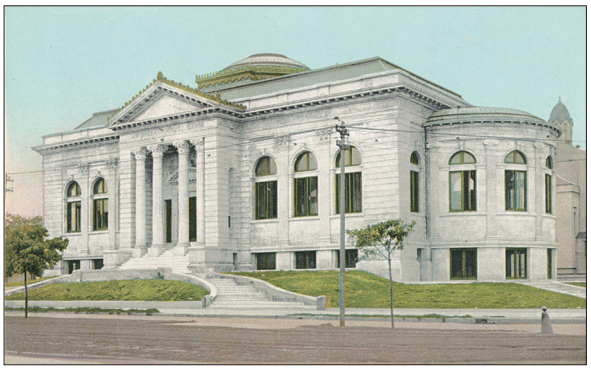
Think Twice

How does vertical integration differ from horizontal integration? Explain why both were effective in the rise of big business.

Complicated Legacies

The legacy of nineteenth-century American entrepreneurs, industrialists, and business leaders is complicated. These individuals were called "captains of industry" at the time for their contributions to the American economy, including the employment opportunities they provided to tens of thousands of workers. They played a major role in the rapid expansion and industrialization of the national economy. While some Americans applauded entrepreneurs' use of innovative machines and ideas, others accused them of ruthless business practices and the exploitation of other people's labor. These opponents labeled men such as Rockefeller and Carnegie "robber barons"—people who lived like royalty at the expense of others.

Some wealthy industrialists, including Carnegie and Rockefeller, became philanthropists and used part of their fortunes to benefit society. Carnegie donated more than $350 million to a variety of causes and projects over his lifetime, contributions worth billions in today's dollars.



Carnegie dedicated a considerable amount of his funds to building thousands of libraries around the world, including in Louisiana. The old main branch of the New Orleans Public Library, a "Carnegie library," was built in 1908 and later demolished in 1959.

He contributed to foundations and universities, paid for hundreds of public libraries across the country, and established a number of charitable foundations that still bear his name today. Meanwhile, Rockefeller engaged in philanthropy beginning in 1897, donating more than $500 million over the next forty years. Rockefeller's philanthropic achievements included founding the University of Chicago and establishing the Rockefeller Foundation.

Think Twice

Should a wealthy industrialist such as Andrew Carnegie be characterized as a captain of industry or a robber baron? Why?

Big Business Gets Too Big

During the late 1800s and early 1900s, public demand led the federal government to reconsider its laissez-faire approach to big business. Decades of public anger and distrust led the Senate to hold hearings about

the railroads' unfair rate practices. This led Congress to pass the Interstate Commerce Act of 1887, which established federal oversight of the railroad industry through the Interstate Commerce Commission (ICC). Made up of a five-member enforcement board, the ICC was responsible for regulating how the railroads conducted business, including putting an end to fare gouging. While the Interstate Commerce Act of 1887 proved largely ineffective, its passage signaled a shift in the relationship between the government and private businesses: The government would begin to take a more active role in the economy.

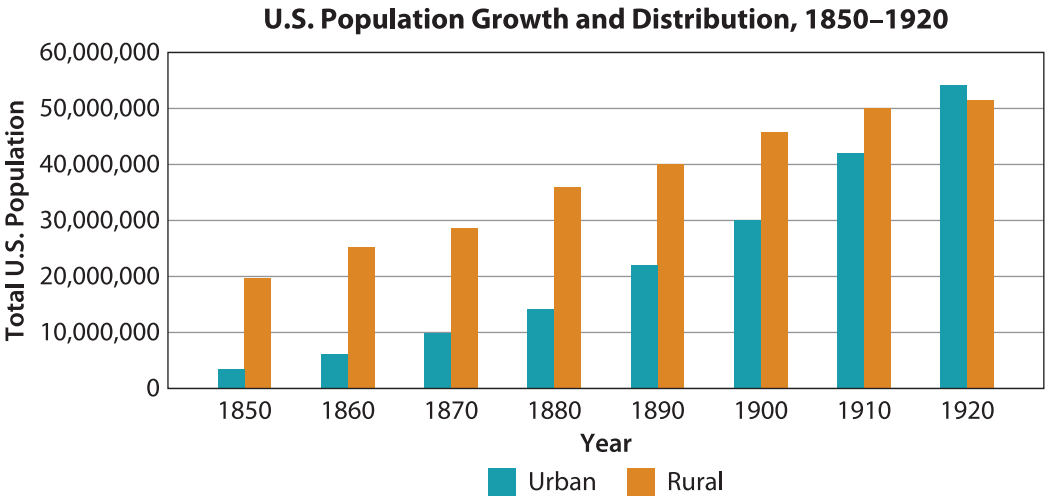
Congress continued its efforts to regulate big business with the Sherman Antitrust Act of 1890. The legislation, introduced by Senator John Sherman of Ohio, aimed to promote competition by outlawing monopolies. The act used Congress's power to regulate interstate commerce to prohibit monopolies and trusts. The act was widely supported; the Senate passed the act in a 51–1 vote, and the House passed it unanimously. With the Sherman Antitrust Act, the federal government gained the power to take legal action against trusts, like John D. Rockefeller's Standard Oil Company, and break these companies up into smaller parts. However, the Sherman Antitrust Act worked better in theory than in practice. The new law's wording was loose. It did not define terms such as *trust* or *monopoly*, which made it difficult for the government to legally identify and prosecute offending corporations. Meanwhile, an 1895 Supreme Court decision undermined the power of the Interstate Commerce Act by ruling that it did not apply to manufacturing. The justices determined manufacturing was an intrastate activity—something that happened within a state, not between states—meaning that the states, not the federal government, were responsible for regulating it.

Think Twice

How did the Interstate Commerce Act and the Sherman Antitrust Act attempt to rein in big business?

Workers and Industrialization

The Second Industrial Revolution had a profound impact on American workers, changing the ways they lived and worked. The United States at this time underwent **mechanization**: the introduction of machines into the workplace and daily life. The number of jobs requiring people to work with machines increased rapidly. In just thirty years, the number of machinists in the United States grew from 55,000 to 283,000. These workers operated machines that made interchangeable parts for an array of products. They also used machines that made parts for other machines. There was a growing market for consumer goods and machines. Machinists across the country worked in factories that



As the country's population grew, its labor force did, too. Increasingly, men, women, and children found work in America's cities instead of on its farms.

created a great variety of manufactured goods, such as electric streetcars, bicycles, mechanical reapers, and sewing machines.

Mechanization meant that less labor was needed on farms. At the same time, factories in America's growing cities saw an increased demand for labor. These factors, combined with an influx of immigration, facilitated rural-to-urban migration on levels never before seen in the United States.

Think Twice

How did industrialization affect population distribution in the United States during the late 1800s and early 1900s?

Working Conditions

As millions of people flooded into cities in search of industrial work, they discovered that these opportunities often came at a cost. Many lived in cramped and dirty accommodations, ate poor-quality food, and had little money to spend on themselves. About a quarter of working families lived in poverty, while another 45 percent hovered just above the poverty line. At the same time, workers frequently endured harsh and dangerous conditions in factories—often a result of demands by factory owners and managers to increase productivity and efficiency while keeping costs low.

Factory owners wanted to extract as much labor from their workers as possible. Today, many people typically work a forty-hour workweek. In 1890, however, the federal government found that full-time factory workers labored for one hundred hours a week on average—and this number was slightly higher for people working in the building trade. Industrial work was very different from agricutural work. As farmers,

people's time was their own, but as industrial workers, they had to follow their employers' schedules. This led more laborers to begin lobbying state legislatures for shorter working hours. In 1867, the Illinois state legislature passed the country's first law establishing an eight-hour workday. However, the law had many loopholes that enabled employers to work around the requirement. You will read more about the efforts of organized labor to change these policies shortly.

Low wages were a major issue facing industrial workers. In 1880, the average wage in the United States was just $2.34 a day, with many factory workers earning half that sum. Factory owners had incentives to keep workers' wages as low as possible: Lower wages meant lower production costs, and lower production costs meant greater profits. The constant stream of new workers pouring into urban areas helped keep wages low, especially in unskilled jobs, or those that did not require a certain level of education, experience, or training. Often, if a worker quit, another person in need of the job was there to take their place.

In addition to long hours and low wages, factory workers also endured a slew of safety concerns. As you have read, little government regulation existed as rapid industrialization took off and factory owners focused on profitability. Labor was cheap, and workers could be easily replaced should something happen to them on the job. The heavy machinery that workers operated could cause them to lose fingers, limbs, or even their lives, but many employers were content with this risk.

Depending on the industry, fires and explosions were commonplace. Workers inhaled dust and fumes generated by machinery, and constant exposure to loud noises resulted in hearing loss. Dimly lit factories caused eye strain, and lack of protective gear meant that workers' vision could be damaged by machinery malfunctions, flying objects, or sparks. Factory work was also physically and mentally taxing. Recall that factories relied on the division of labor to increase their productivity. This caused factory work to be highly repetitive and monotonous, and it took a toll on workers' bodies as well as their minds.

Some businesses worked to lower costs by developing **sweatshops**, a type of factory or workshop that was common in the clothing industry. Sweatshops required employees to work long hours for very low wages in cramped conditions, sometimes in the buildings where the workers lived.

Over time, workers and labor organizations pressured the government to act to improve unsafe and unfair working conditions. The public also became increasingly sympathetic to labor issues. One reason for this shift in sentiment was that much more of the public now worked in industry. Additionally, many

Americans believed that in a democracy, where the government was supposed to serve the people, it had a *responsibility* to step in on behalf of workers. State labor bureaus began investigating claims of unsafe working conditions, resulting in the development of more systematic factory inspections. As you will soon read, this pressure also encouraged state legislatures to start passing laws that protected workers' safety and rights.

Think Twice

How were factory owners able to justify paying workers low wages?

Changing Roles for Women

Increased industrialization changed the role of women in American society. More and more women worked outside of the home as the nineteenth century progressed. In 1870, there were around one million women in the workforce, most of whom were employed in domestic service, such as housekeepers. This number grew to nearly eight million by 1910.

Increasingly, because industrial wages were so low, women needed to find employment to help their families survive. That did not mean, however, that women were afforded the same opportunities as men. They were limited by

This young woman worked as a spinner in a mill in South Carolina during the early 1900s. Though the South was less industrialized than the North before the Civil War, many Southern states worked to diversify their economies during the second half of the nineteenth century. As a result, new textile mills and other types of factories opened in the region.

what society perceived as "acceptable" or "respectable" jobs for women. These included factory jobs (especially in the garment and textile industries), domestic service, nursing, teaching, working in department stores, and clerical work. Women were also paid lower wages than men, even in instances where they were performing the same job.

Women who worked outside the home were still expected to keep their household running. In addition to working long hours for low wages, they were responsible for cooking, washing, cleaning, mending, childcare, and shopping. Despite the breadth of these burdens, new employment opportunities afforded by industrialization gave women more freedom than ever before, including increased financial independence and the ability to work outside the home. This was especially true for women who held jobs that were not in domestic service.

Think Twice

What types of jobs were deemed acceptable for women during the Second Industrial Revolution?

Child Labor

While American children had long done agricultural work and chores, through the late 1800s and into the early 1900s, more and more children were employed in industrial jobs. In 1870, about one in eight children had a job; this number grew to one

This photograph, taken in the early twentieth century in Pennsylvania, shows a group of breaker boys during a day at work.

PRIMARY SOURCE: "THE WAIL OF THE CHILDREN," MOTHER JONES, 1903

Mary Harris "Mother" Jones was a labor organizer in the late nineteenth and early twentieth centuries. In July 1903, Jones led a march from Philadelphia to New York City to draw attention to the issue of child labor. The following excerpt comes from a speech Jones gave during the march.

We want President Roosevelt to hear the wail of the children who never have a chance to go to school but work eleven and twelve hours a day in the textile mills of Pennsylvania; who weave the carpets that he and you walk upon; and the lace curtains in your windows, and the clothes of the people. . . .

In Georgia where children work day and night in the cotton mills they have just passed a bill to protect song birds. What about the little children from whom all song is gone?

I shall ask the president in the name of the aching hearts of these little ones that he emancipate them from slavery. I will tell the president that the prosperity he boasts of is the prosperity of the rich wrung from the poor and the helpless. . . .

We are told that every American boy has the chance of being president. I tell you that these little boys in the iron cages would sell their chance any day for good square meals and a chance to play. These little toilers whom I have taken from the mills—deformed, dwarfed in body and soul, with nothing but toil before them—have never heard that they have a chance, the chance of every American male citizen, to become the president.

Source: Jones, Mary Harris. *Autobiography of Mother Jones*. Edited by Mary Field Parton. Chicago: Charles H. Kerr, 1925, pp. 80–81.

in five children by 1900. According to the U.S. Census, at least 18 percent of children between the ages of ten and fifteen were employed. They mostly came from lower-income households that relied on the paltry wages they earned. In many instances, the age of a child was less important than their size; parents and employers considered whether a child was simply big enough to work a specific job.

Unsurprisingly, working conditions for children in jobs at factories and mines were much different than for children working on farms, where many tasks were done outside. Child industrial laborers worked long hours, anywhere from twelve to eighteen hours a day, five or six days a week. Children were made to do a variety of tasks, depending on the industry in which they worked. For example, children employed in mines might

work as "trappers" or "breaker boys." The trapper was responsible for opening a door to the mine to let coal cars pass through; when not performing this task, the child sat in total underground darkness next to the door. Breaker boys sat on wooden benches, breathing in coal dust while they sorted impurities from freshly mined coal as it passed by on a conveyor belt. Meanwhile, children employed in mills might sweep the floor, spin thread, or replace the bobbins on the machines when they were empty.

Industrial work was dangerous for children. Many children sustained serious, sometimes fatal injuries in industrial accidents or just from the unsafe working conditions. Some child laborers developed respiratory illnesses from inhaling coal dust in the mines or fiber particles that came from machinery in the mills.

Think Twice

How did work for children change during the 1800s?

Immigration

Immigration to the United States boomed during the second half of the nineteenth century, with some twenty-five million immigrants making their way to the country between 1865 and 1914. Most of these new arrivals came from Europe, and many of them chose to make their homes in Midwestern and Northeastern cities. In 1870, 44.5 percent of the population of the country's largest city—New York—was foreign-born. The percentage of foreign-born people was even higher in some Midwestern cities such as Chicago and Milwaukee. In Pittsburgh, Boston, and St. Louis, foreign-born people made up roughly a third of the population. As the 1800s progressed, the demographics of immigrants shifted. While earlier, or "old," immigrants were primarily Protestant and from northern and western Europe, the "new" immigrants arriving in the late nineteenth century had different religious beliefs and came from southern and eastern Europe.

Push and Pull Factors

People immigrate for a variety of reasons. Push factors are the reasons people choose to leave a place—for example, political instability, poverty, religious persecution, or famine. Pull factors are reasons that draw people to a specific place, such as political stability, economic opportunity, or religious freedom. In the late 1800s, push and pull factors varied by immigrant group, meaning that the factors that influenced immigrants who settled in the West often differed from those of immigrants who settled in urban areas.

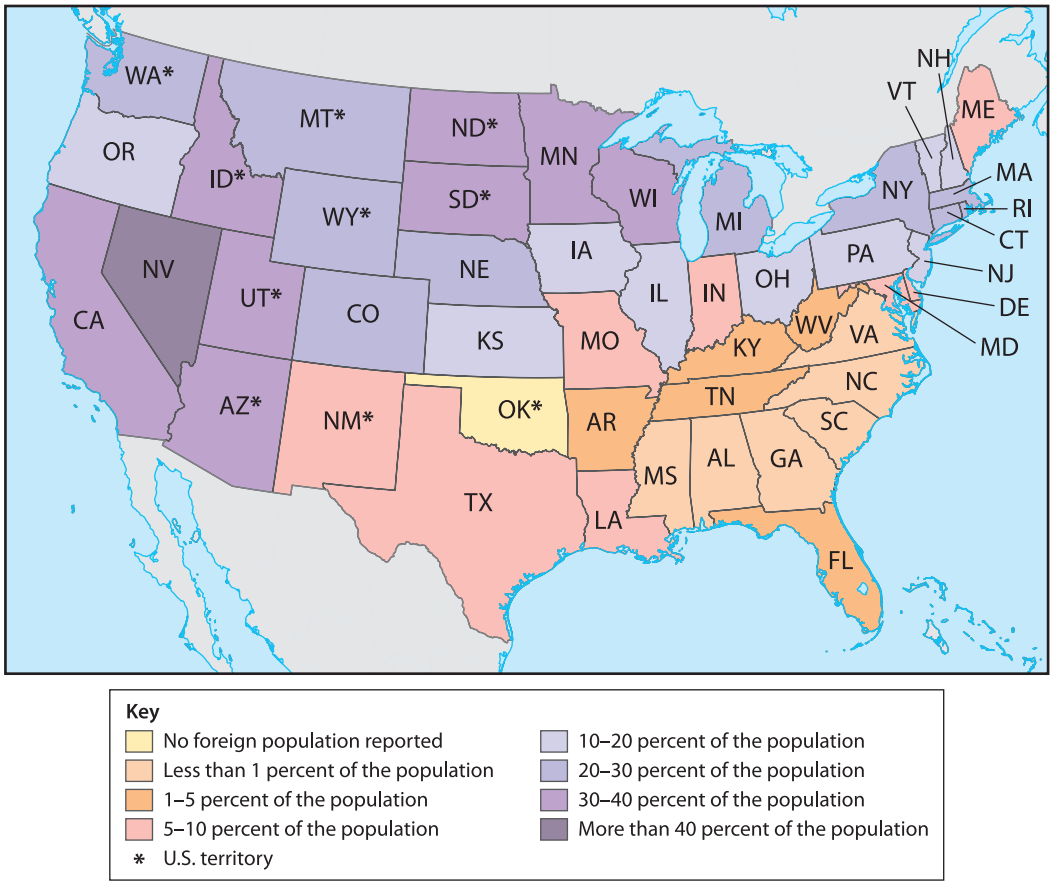
It is important to remember that people were pulled to the United States as much as they were pushed from their places of origin. Many immigrants saw and dreamed of America as a place of opportunity, equality, and justice. They

Immigration Push Factors During the Late 1800s

Group	Push Factors
Irish	Potato famine (Great Hunger or Great Famine) that led to starvation, disease, poverty
Germans	Failed democratic revolutions (1848), lack of economic opportunity
Swedes	Famine, rapid population growth, limited arable land
Italians	Poverty, war, violence, natural disasters, social upheaval
Eastern European Jews	Religious persecution, pogroms, poverty, discrimination under Russian rule

A variety of reasons inspired European immigrants to seek a better life in the United States during the Second Industrial Revolution. This table describes the reasons of some of the main groups who arrived in the nineteenth century.

Percentage of Foreign Population by State, 1880



Through the late 1800s and early 1900s, immigration was largely concentrated in northern and western states. In 1880, there were just forty states in the Union; areas with asterisks are territories that eventually became states.

were inspired by what they knew of American democracy and self-government—things that had been denied to many of them in their homelands and were yet unrealized for many U.S. citizens at the time. Immigrants, as much as anyone, pursued a vision of the "American Dream." For many, the American Dream was about not just individual wealth but also the idea that people from around the world, whatever their origins, could live in freedom and security while building new lives in the United States.

Economic pull factors were also important, alongside the dream of democratic self-government. Westward expansion and government incentives, such as the Homestead Act of 1862, made large tracts of land available to those who could afford to work it. At the same time, industrialization led to the rapid increase of new jobs in urban factories, in mines, on railroads, and on other infrastructure projects. For example, many Italian immigrants worked in industry and construction, helping build American infrastructure such as tunnels, bridges, roads, and the country's first skyscrapers. Irish immigrants often took jobs in factories and mining and with the railroads. Immigrants came with the hope of finding a new job, a new home, and a new life. Unfortunately, the reality of these opportunities was often unpleasant. Work could be hard to come by, and immigrants often took whatever jobs were available, regardless of their prior career experience. They also frequently accepted lower wages—and more dangerous working conditions—than many U.S. citizens would.

Think Twice

What were some push and pull factors that encouraged immigration to the United States during the late 1800s and early 1900s?

Discrimination and Restriction

Beyond the struggles of finding work and settling into an unfamiliar place, immigrants often faced discrimination. In Topic 1, you read about the rise of nativism during the mid-1800s. Religion was one driver of nativist sentiments. Most Americans already living in places where immigrant communities settled were Protestants. By contrast, many immigrants, including most from Ireland and Italy and some from Germany, were Catholic. Protestants and Catholics are both Christians, yet differences in how they practiced Christianity often led them to distrust each other. Some Protestant Americans even held the irrational fear that Catholic immigrants were part of a scheme by the pope, the leader of the Roman Catholic Church, to undermine Protestantism in the United States.

In addition to bristling at differences in religion, some Americans accused new arrivals of changing the United States in undesirable ways. Immigrants were accused of causing crowding in cities, contributing to rising crime

The Statue of Liberty greets immigrants entering New York Harbor on their way to Ellis Island (c. 1910).

rates, and even spreading disease. Some Americans were also worried that immigrants would transform American politics by bringing radical ideas with them, such as socialism or even **anarchy**, or the absence of any government. Others worried that immigrants would form voting blocs, or like-minded voting groups that could influence local or national elections. While these concerns and fears were largely unfounded, they led to widespread discrimination against the millions of immigrants who came to the United States in hope of a better life.

In some instances, anti-immigrant sentiment resulted in violence. Chinese immigrants and communities were often targeted. People from China were singled out for hostile treatment because their cultural and religious practices and style of dress were viewed as radically unlike those of mainstream American culture. Sometimes these prejudices became deadly, as happened in Denver, Colorado, in 1880, when an argument between Chinese immigrants and white residents in a Chinatown business ignited a bloody race riot. One immigrant died, and many others were injured.

Anti-immigrant sentiment was more often reflected by restrictive immigration policies. You read about the 1882 Chinese Exclusion Act in Topic 1; the federal government would go on to restrict immigration from other Asian countries as well. This included the Gentlemen's Agreement of 1907, by which the U.S. government negotiated with the Japanese government to limit emigration from Japan to only businesspeople and family members of Japanese people already living in the United States. In return for Japan's cooperation, the U.S. federal government agreed to apply pressure to the city of San Francisco to end segregation policies that prevented Japanese students from attending the same schools as white students.

Another significant development around this time was the opening of an immigration receiving station on Ellis Island in 1892. Located in New York Harbor, the receiving station became the main point of entry for immigrants arriving in the country, who were first greeted by the Statue of Liberty on nearby Liberty Island. Designed by Frédéric-Auguste Bartholdi in collaboration with Gustave Eiffel, the 305-foot (93 m) statue was gifted to the United States by the French government in 1884 and dedicated in its present location in 1886. It soon

became a symbol of hope, freedom, and opportunity for millions of people.

The original Ellis Island station had the capacity to process up to five thousand new arrivals a day. After several expansions, the facility could process as many as fifteen thousand people a day. All told, sixteen million immigrants went through Ellis Island before its closure as an entry point in 1954.

In 1910, an immigration receiving station for the West Coast was built on Angel Island in San Francisco Bay. The Angel Island facility, which primarily processed immigrants from Asia, operated for thirty years before it was partially destroyed by a fire. After 1940, immigrants arrived at a facility on the California mainland.

Think Twice

What are some of the forms that anti-immigrant sentiment took during the late 1800s and early 1900s?

Community and Assimilation

Many immigrants settled in the United States because they were encouraged to migrate by family, friends, and other people from their country of origin who were already living in the United States. Often, people from the

This photo, taken around the year 1900, shows Mulberry Street in New York City's Little Italy. Today, the neighborhood continues to preserve and share Italian heritage, only blocks from Manhattan's Chinatown.

Contributions to American Society

Late nineteenth- and early twentieth-century immigration had a significant impact on more than just the U.S. population and workforce. Immigrants and their descendants contributed greatly to the economic development of the country. They helped settle the West, built vast stretches of the transcontinental railroad, arrived with a variety of trades and skills, and participated in the rapid industrialization of the country. Immigrants brought with them their languages, foods, and beliefs. They also brought with them myriad traditions, many of which are a part of mainstream American culture today. These include Easter-themed chocolate bunnies and Christmas trees introduced by German immigrants and Halloween traditions introduced by Irish immigrants. Saint Nicholas, or Santa Claus, was introduced by Dutch, German, Swiss, and Ukrainian immigrants. Through the late 1800s and into the early 1900s, immigrants also contributed to the labor movement and various reform movements, which you will read about in a later section and in Topic 3.

With immigration came a variety of innovations that changed American life. You have already read about two such innovations: blue jeans, invented by German immigrant Levi Strauss, and alternating current electricity, invented by Serbian immigrant Nikola Tesla. Other life-changing innovations by immigrants include the telephone, invented by Scottish immigrant Alexander Graham Bell, and the electric elevator, pioneered by Swedish immigrant David Lindquist. Additionally, some of the "captains of industry" whom you previously read about, including Scottish immigrant Andrew Carnegie, were immigrants who had an enormous impact on American life.

same country settled near each other. The legacy of this is still evident across the United States, from more rural communities in the Midwest to insular, or somewhat culturally isolated, neighborhoods in cities. For example, there are Little Italy neighborhoods in Baltimore, Boston, Chicago, New York City, San Diego, and St. Louis, to name just a few.

Settling in communities with other people from their country of origin offered many benefits to recent immigrants. They could live among people who spoke the same language, shared the same culture and traditions, and practiced the same religion. Immigrant communities established places of worship and community centers that provided mutual assistance to their members. In many cities, immigrant communities acted to elect representatives who would promote their interests, as was the case in Boston and New York City. In these cities, Irish immigrants who had become citizens elected people of Irish descent to the positions of mayor and city council member.

The immigrant communities that provided services, stability, and familiarity to their members were viewed with distrust and hostility by some Americans. Because immigrants spoke their home languages in their new American communities, English-speaking Americans often perceived them as unwilling or reluctant to learn the language. They felt this was an indication that these immigrants did not want to assimilate into mainstream culture. Some Americans, including those in Boston's Immigration Restriction League, went so far as to argue that some immigrant groups were incapable of assimilating, making immigrants a threat to their vision of the American way of life. Anti-immigration attitudes contributed to a push for anti-immigration policies, including those you read about in the previous section.

It is important to note that concerns about assimilation were rooted in **xenophobia**, an irrational fear of the "other."

Think Twice

What were the pros and cons of insular immigrant communities during the late 1800s and early 1900s?

Life in Cities

Urbanization was one of many by-products of the Second Industrial Revolution. Cities such as New York, with populations in the hundreds of thousands, became home to millions of people in just a few decades. But such rapid urbanization came at a cost—to inhabitants, to government, and to infrastructure.

Challenging Living Conditions

The rapid industrialization in cities raised a crucial question: Where would new arrivals live? For many, the answer was tenements. These new buildings were designed to maximize occupancy rather than comfort—or safety. A typical tenement building was five to seven stories tall, about a hundred feet (30 m) deep, and twenty-five feet (7.6 m) wide. Tenements had few windows, and many rooms had little or no natural light. There was shoddy plumbing, or sometimes none at all, and many buildings lacked fire escapes.

Tenement buildings were built close together and constructed to cram as many residents as possible into one building. This maximized the use of available land, but it also meant that people lived too close together with limited air circulation. These close quarters led to the rapid spread of diseases, including deadly cholera, from person to person, family to family, and building to building. Proximity, along with cheap building materials, also made it possible for fires to spread quickly. The Great Chicago Fire of 1871 destroyed more than seventeen thousand buildings, displaced ninety thousand people, and killed three hundred more in a little more than a day.

This photo, included in *How the Other Half Lives*, shows an Italian mother with her baby living in a New York City cellar. Riis's work highlighted the high rates of infant mortality in cities.

The tide turned against tenements with the rise of newspaper journalism and photography devoted to the subject. Journalists exposed to the wider public the squalid and unsafe conditions in the tenements. In 1890, Jacob Riis, a Danish immigrant, author, and photographer, brought national attention to the plight of the urban poor with his book *How the Other Half Lives*. It included graphic images of urban living conditions. Riis's work sparked reform efforts, including New York's Tenement House Law of 1901, that addressed harmful conditions in existing tenements and prevented similar issues in the future. You will read more about these efforts in Topic 3.

Tenements were not the only challenge that urban dwellers faced. Rapid urbanization put immense strain on the existing infrastructure of America's cities. Most of it had been designed when cities and their populations were much smaller. City streets were made of dirt, which quickly became impassable mud when it rained. Even if tenements had sufficient plumbing, many cities lacked sufficient sewers to remove the waste. As a result, garbage and waste were dumped directly onto the street from the windows of buildings or into nearby waterways. City residents also lacked access to safe drinking water.

New York City and other major urban areas eventually began scheduled garbage collection and constructed municipal sewage systems. At the same time, scientists began to better understand that sickness was caused

Reversing a River

In 1852, Chicago formed its Board of Sewerage Commissioners to begin designing the country's first major urban sewer system. While sewers worked well for managing the city's waste, they created another problem: The sewers dumped refuse near the mouth of the Chicago River, where the city's municipal water came from—the water people used for drinking, cooking, and bathing. To deal with this dangerous issue, the city decided to move the municipal water intake system farther along the shore of Lake Michigan, away from the waste. Then the city began pumping water from the Chicago River into the Illinois and Michigan Canal to maintain necessary water levels during a dry spell. This reversed the river's flow, and wastewater was carried away from the lake.

Living conditions in tenements were cramped. Unable to dry laundry in their small apartments, families strung their wet wash on clotheslines between buildings.

by germs, or microscopic organisms. This is called the germ theory of disease. With this knowledge, scientists and city planners realized that dirty water was a leading cause of urban diseases such as cholera. This led to the use of new filtration methods by the turn of the century and the first use of chlorine to disinfect drinking water in 1908.

Cramped urban conditions and widespread poverty frequently gave rise to crime in America's cities, including New York. During the mid-1800s, Irish, German, and Scottish immigrants settled in the bustling Five Points neighborhood in lower Manhattan. Some of these groups formed gangs to assert dominance over certain areas of the neighborhood and to support criminal activity that often provided higher income than paltry industrial wages. Clashes between rival gangs could be violent, and some extracted payments from local businesses in exchange for protection. Gang members engaged in a range of illicit behaviors, from petty crimes such as pickpocketing to much more serious acts, including counterfeiting, robbery, racketeering, and even murder.

Think Twice

How did rapid industrialization in the late 1800s affect the immigrant population living in urban America?

Political Machines

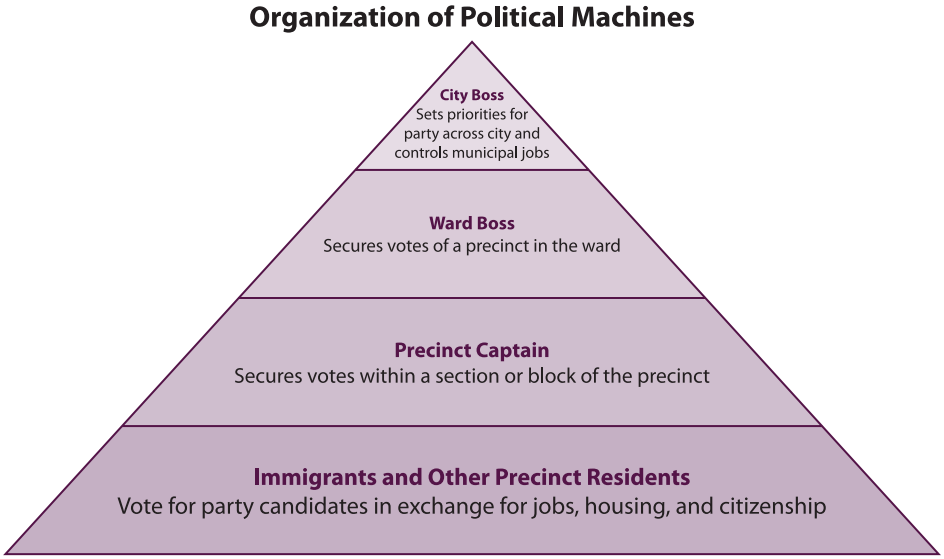
America's cities were clearly poorly equipped to manage the millions of immigrants who entered the country during the Second Industrial Revolution. Besides housing shortages and insufficient infrastructure, cities also lacked other basic resources to assist new arrivals in necessary tasks, such as finding a job and a place to live. Over time, **political machines**—organized groups that controlled politics in a city—filled this gap.

Political machines had a hierarchical structure with a political boss at the top and organizers who worked at lower tiers in different parts of a city. These organizers helped immigrants and poor citizens meet their basic needs, such as food and housing. In exchange, those individuals promised to cast their ballots for members of the political machine during elections. **Party bosses** then rewarded successful organizers with jobs in the government. While political machines were characterized by corruption, their breadth and power did often lead to positive results: assistance to newly arrived immigrants, improved city services, and increased business development.

Tammany Hall is one of the best-known political machines in American history. Founded in New York City in 1789—and named for Tamanend, a leader of the Delaware people of the Atlantic Seaboard—the organization operated under paired purposes: getting Democratic Party candidates elected to office and helping poor people and immigrants (many of whom were Irish) living in the city. And it accomplished these goals, in its own questionable ways. Politicians and their staff helped people find jobs and housing, gave them gifts of food, and provided legal assistance. Then

The End of the Spoils System

Political machines were not the only instance of corruption in nineteenth-century government. By the 1880s, the spoils system put in place by President Andrew Jackson more than fifty years earlier, in which loyal supporters and friends of the president and other politicians were promised government jobs, had resulted in a bloated, often unqualified bureaucracy. In 1883, Congress passed the Pendleton Act to put an end to this patronage. Positions in the federal government now had to be filled by individuals who proved they had the right experience for the job. Applicants proved their merit through a new civil service exam, which tested them for requisite skills and education. Furthermore, the Pendleton Act made it illegal for federal employees to be forced into participating in political activities and making political contributions. It also prevented the firing of federal employees for political reasons. Today, the protections and provisions of the Pendleton Act still apply to most federal employees.



In a political machine, bosses draw power from the votes of those in the communities and neighborhoods under their authority.

beneficiaries repaid this debt at the polls, helping keep Tammany Hall and Democratic candidates in power. Because ballots were not secret at this time, party bosses could carefully monitor this loyalty—as could nativist groups, which used it to argue that immigrants were responsible for corruption.

During the mid-1800s, William "Boss" Tweed began rising through Tammany Hall's ranks. He was first elected to office in 1851 as a city alderman, a type of local legislator. By 1868, he was a New York state senator and the party boss. But Tweed's influence was not limited to New York City. In addition to exerting influence over New York City's mayor, he also had the Speaker of the state assembly and the governor of New York under his control.

Tweed's legacy as a party boss is a complicated one. For example, during the Civil War, draft riots broke out in New York City in 1863 as Irish immigrants protested the policy that allowed wealthy Americans to avoid the military draft. Affluent people could avoid serving by paying someone else to fight in the Union Army in their place. Tweed managed to secure exemptions for some poorer men with families, and for others, he used Tammany funds to pay for their substitutes. More broadly, the so-called Tweed Ring helped thousands of immigrants become naturalized citizens. Tweed and his associates arranged medical care for the poor and gave gifts of coal so people could heat their homes. Tweed also donated millions of dollars to community institutions, including schools, hospitals, churches, and synagogues.

At the same time, Tweed was extremely corrupt. He used bribery to keep his

operatives in power and to convince judges to issue favorable rulings. He awarded thousands of patronage jobs and contracts and tampered with elections. Tammany Hall also misrepresented the costs of building projects around the city; unsurprisingly, Tweed and his associates pocketed the excesses. All told, the Tweed Ring stole as much as $200 million from New York City. Tweed's corrupt empire started to unravel with his arrest in 1873. He was released in 1875 and was later rearrested. Tweed managed to escape briefly to Cuba and Spain but was ultimately recaptured and died in prison in 1878.

Think Twice

How did political machines benefit immigrants living in cities?

A Growing Middle Class

The Gilded Age was a time of immense inequality. The elite industrialists—the "robber barons"—were at the top of the social order, while poor, working-class people, many of whom were immigrants, struggled to survive at the bottom. Many American families lived in extreme poverty during this time.

Between these two economic extremes, a new middle class began to emerge. Along with creating industrial jobs, the Second Industrial Revolution also led to an array of professional jobs, such as clerks, engineers, and shopkeepers. The middle class lived more modestly than wealthy elites, but they enjoyed a comfortable existence nonetheless, often living in single-family homes or apartments with electricity and telephones. They could afford to send their children to school and indulge in some leisure opportunities, made even more accessible by improvements to urban public transportation.

Organized Labor and Unions

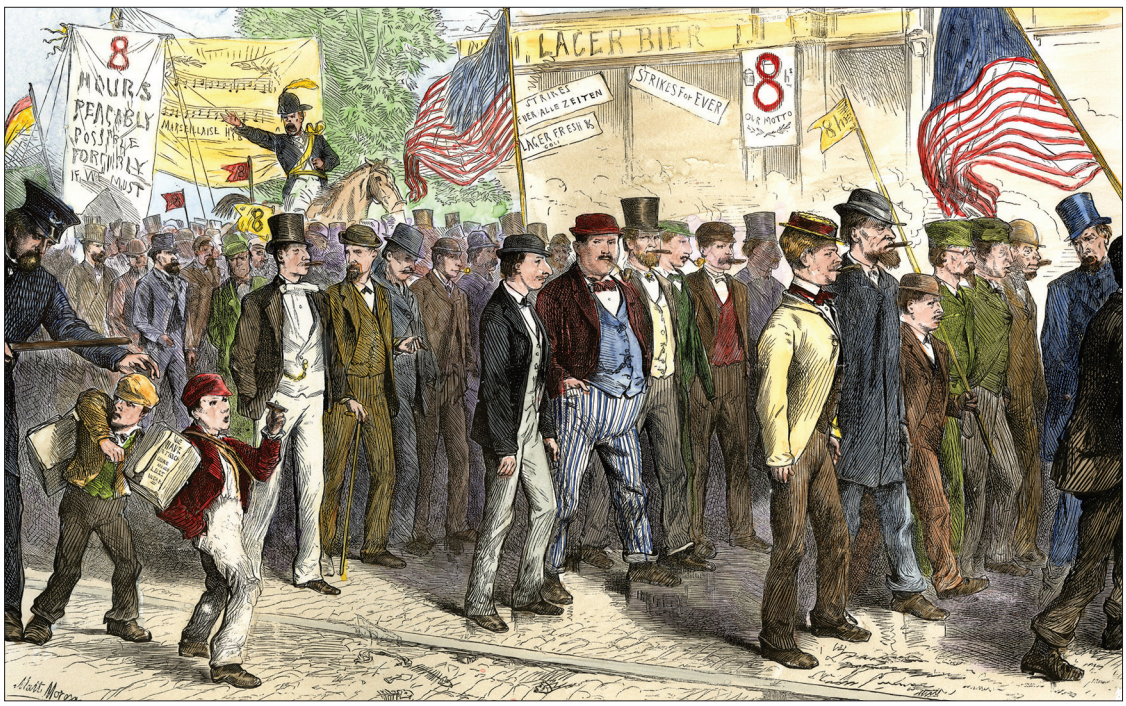
The rise of American industry and the labor it required was accompanied by another new development: workers organizing to advocate for themselves as a group.

This began to emerge during the Second Industrial Revolution. Due to division of labor, individuals were no longer responsible for every step in the production of a good, and most industrial workers struggled to make ends meet. A large percentage of the population experienced challenging working conditions, long hours, low wages, and competition. Workers realized that while one individual may not be able to change things, many workers together could. This realization led to the formation of unions.

Workers formed different kinds of unions. Skilled workers such as carpenters and steam pipefitters belonged to trade unions.

Unskilled workers, or those who did not specialize in a certain economic activity, generally belonged to labor unions. Trade unions were more successful than labor unions during the late 1800s and early 1900s. This was largely because factory owners could more easily replace unskilled workers who went on **strike**. By contrast, it was much harder to replace skilled workers. This gave trade unions more leverage when negotiating for safer working conditions, shorter hours, or higher wages.

Despite the harsh conditions that workers often experienced in the booming industry of the late 1800s, the public was often unsympathetic toward the labor movement. Because many strikers were immigrants, some Americans feared that organized labor was motivated by the political radicalism they had read was happening in other parts of the world (and that you will read about in Unit 4). The violent tactics used by some groups, such as the Molly Maguires, a secret organization of Irish coal miners formed in the 1870s to bring awareness to working conditions in Pennsylvania's mines, alienated some people. Media portrayals that often exaggerated labor actions while downplaying the forceful responses of factory owners, managers, and law enforcement influenced others. Unsurprisingly, business owners often disapproved of unions and took extreme measures to quash strikes and other union



Going on strike was one tactic used by organized labor to gain concessions from employers. This image shows a parade of strikers demanding an eight-hour workday in New York in 1872.

tactics. You will learn more about some of these incidents shortly.

Think Twice

How did the public view organized labor during the late 1800s?

National Labor Unions

In August 1866, the leaders of the Coachmakers' International Union, the Iron Molders' International Union, and the Machinists and Blacksmiths Union gathered in Baltimore, Maryland, to discuss their collective interests. Over the course of their five-day meeting, the attendees established the National Labor Union and a variety of committees to address workers' demands.

Although the National Labor Union was short-lived—it dissolved in 1873—it was impactful nonetheless, including by bringing national attention to the movement for an eight-hour workday, which gained momentum through the late 1800s and early 1900s.

The National Labor Union also laid the groundwork for later groups, such as the Knights of Labor (KOL). Founded in 1869 as a secret organization to protect members from employer retaliation, the KOL became a major labor force during the Second Industrial Revolution. Unlike earlier unions, it was notably inclusive, allowing skilled and unskilled workers, women, immigrants, African Americans, and Native Americans to join—though it excluded Chinese laborers on the West Coast. The KOL formally adopted a platform in 1878 supporting an eight-hour workday, cooperative ownership, and equal pay. It soon expanded nationwide and achieved several victories through successful strikes in the railroad industry.

Trade unions formed the American Federation of Labor (AFL) in 1886 and elected Samuel Gompers as its president. The AFL focused its attentions on "pure and simple trade unionism" to improve the economic well-being of its members. Gompers was a shrewd leader who quickly realized that state governments and the courts rarely sided with workers. When workers went on strike, the courts issued **injunctions** against them. When employers underpaid or mistreated their workers, the courts did not rule against the businesses. In response, Gompers and the AFL followed a strategy of first engaging in **collective bargaining** with employers and then organizing strikes when collective bargaining—and attempts to encourage new labor-friendly legislation—failed. Unlike the Knights of Labor, the AFL limited membership to skilled workers, did not actively recruit African Americans or women, and tolerated exclusionary practices by many of its member unions.

Think Twice

How was the American Federation of Labor similar to and different from the Knights of Labor?

The Great Strikes

Strikes are a powerful way for workers to win better working conditions, hours, and wages. Near the end of the nineteenth century, strikes often spread to other regions, gaining support and traction from workers in those regions. Many strikes had violent or destructive outcomes. This, combined with the public's continued fear of political radicalism within unions, meant that many Americans did not support strikes, and the federal government typically stepped in to shut them down. Until then, workers' emergency savings dwindled in the absence of wages, and companies hired strikebreakers—negatively nicknamed "scabs"—as replacements.

On May 1, 1886, a group of workers organized a strike at the McCormick Reaper Works in Chicago. During the event, police killed several of the workers. On May 4, protesters assembled in Haymarket Square, about four miles (6.4 km) from the McCormick Reaper Works, to protest police violence. The demonstration itself became violent after someone set off a bomb that killed a police officer, leading police to attack the crowd. Multiple officers, protesters, and others in the crowd were killed. Although law enforcement did not discover who threw the bomb, eight people were convicted of conspiracy.

The KOL was blamed for the Haymarket Affair even though it did not organize the demonstration. Negative media coverage and loss of public support caused membership to quickly decline from a peak of about seven hundred thousand in 1886 to just one hundred thousand in 1890. The incident only strengthened many employers' claims that organized labor was made up of anti-government activists, foreigners, and radicals—a broader setback for the labor movement.

The Homestead Strike of 1892 is another notable example of a strike from the era that erupted into violence. Earlier in the topic, you read about industrialist Andrew Carnegie and the Carnegie Steel Company. The Homestead Steel Works, located outside of Pittsburgh, was one of many mills owned by the Carnegie Steel Company. The Amalgamated Association of Iron, Steel, and Tin Workers represented workers at the Homestead Steel Works and had bargained for good hours and wages. But despite the mill's immense profitability, Carnegie and his business partner—and eventual manager of

Strikers at the Homestead Steel Works set fire to the boats carrying Pinkerton detectives.

the steelworks—Henry Clay Frick resented the influence of the union.

In 1892, management announced it would cut workers' wages and refused to negotiate. When the union refused to accept the company's contract terms, Frick initiated a lockout on June 29, 1892. The company built a fence around the mill and contracted with the Pinkerton Detective Agency, a private investigation and security company known for its strikebreaking tactics.

Seven days later, three hundred Pinkerton detectives arrived at the mill by boat, where a crowd of workers and their family members were waiting for them. Chaos ensued. The strikers on shore exchanged fire with the Pinkertons; seven workers and three detectives died. The governor of Pennsylvania sent eight thousand soldiers at Frick's request. The Homestead Steel Works reopened, but the workers had lost.

The Pullman Strike followed two years later, in 1894. In 1893, the failure of several railroad companies had caused a financial depression in the United States. George Pullman, the owner of the Pullman Palace Car Company in Pullman, Illinois, responded to the downturn by firing half of the workers in his factory, some three thousand employees. For those who managed to keep their jobs, Pullman cut their wages by 25 percent. Many of these employees lived in Pullman-owned housing, and they were required to shop at a Pullman-owned company store. However,

Government leaders, railroad owners, and the media ridiculed Eugene V. Debs for his role in the railroad workers' strike. This cartoon, published in *Harper's Weekly* in 1894, depicts him as a king ruling over the railroad unions.

Pullman did not adjust rents or prices to reflect his employees' now-lower wages.

Workers tried to appeal directly to Pullman; he refused to meet with them and had them fired. In response, the remaining Pullman workers went on strike on May 11, 1894. The following month, members of the American Railway Union (ARU), led by Eugene V. Debs, voted to boycott in solidarity with the Pullman workers, many of whom belonged to the union. ARU members would not handle Pullman rail cars, including hitching and unhitching them to trains. On day one of the boycott, June 27, 5,000 workers walked off their jobs, impacting fifteen railroads. By day four, 125,000 workers were participating in the boycott, spreading the impact to twenty-nine railroads across the United States.

Debs encouraged the striking workers to demonstrate peacefully, but tensions were rising to a boil. On June 29, a gathering of railroad workers in Blue Island, Illinois, turned violent, and protesters derailed a train carrying a U.S. mail car, making their actions a federal offense. The government obtained a court injunction against the ARU, preventing Debs and other leaders from contacting its members. On July 3, President Grover Cleveland sent federal troops to Illinois. The military presence only intensified workers' resistance and led to violent conflict between soldiers and strikers.

The Pullman Strike demonstrated the power of unions and collective action. However, it was not a victory for organized labor and fell apart by the middle of July. The government obtained its injunction on the grounds that the ARU's strike interfered with interstate commerce. This effectively meant that national strikes were illegal. Together, the Homestead Strike and Pullman Strike represented a major setback for the labor movement.

Think Twice

How were the Homestead Strike and Pullman Strike similar and different?

Labor in the Twentieth Century

Organized labor continued to evolve during the twentieth century. New labor organizations emerged to take up the fight of workers, including the Industrial Workers of the World (IWW), which was founded in 1905, in part by Eugene V. Debs. The IWW took a more radical approach than its predecessors, including championing general strikes, or large-scale work stoppages across multiple industries. Beyond empowering workers, the IWW also championed issues related to social justice, political corruption, and socialism.

The relationship between organized labor and the government also shifted during the 1900s. The federal government became more sympathetic to labor demands. This was reflected in political party platforms and in the promises made by presidential candidates. A major example of this shift in attitude took place during the coal strike of 1902, when President Theodore Roosevelt personally stepped in to help negotiations among striking miners, mine operators, and government officials, inviting representatives of all groups to the White House for an in-depth discussion of the labor issues in contention.

Labor reform was not the only area of change during the late nineteenth and early twentieth centuries. The Second Industrial Revolution reshaped the United States, but not always for the better. Increasingly, Americans identified and championed a range of issues, from political corruption to education to civil rights, giving way to a period of historic reform called the Progressive Era.

Think Twice

How did the relationship between organized labor and the government shift during the 1900s?

PRIMARY SOURCE: "THE LIBERTY OF THE PEOPLE," THEODORE ROOSEVELT, 1912

The presidential election of 1912, which you will read about in the next topic, was a three-way race between William Howard Taft, Woodrow Wilson, and Theodore Roosevelt. In his speech "The Liberty of the People," Roosevelt describes the difference between himself and Wilson on the issue of labor.

The difference between Mr. Wilson and myself is fundamental. The other day in a speech at Sioux Falls, Mr. Wilson stated his position when he said that the history of government, the history of liberty, was the history of the limitation of governmental power. This is true . . . of the history of medieval Europe. It is not true of the history of twentieth-century America.

In the days when all governmental power existed exclusively in the king or in the baronage and when the people had no shred of that power in their own hands, then it undoubtedly was true that the history of liberty was the history of the limitation of the governmental power of the outsiders who possessed that power. But today, the people have, actually or potentially, the entire governmental power. It is theirs to use and to exercise, if they choose to use and to exercise it. It offers the only adequate instrument with which they can work for the betterment, for the uplifting of the masses of our people.

The liberty of which Mr. Wilson speaks today means merely the liberty of some great trust magnate to do that which he is not entitled to do. It means merely the liberty of some factory owner to work haggard women over-hours for under-pay and himself to pocket the profits. It means the liberty of the factory owner who crowds his operatives into some crazy deathtrap on a top floor, where if fire starts, the slaughter is immense. It means the liberty of the big factory owner, who is conscienceless and unscrupulous, to work his men and women under conditions which eat into their lives like an acid. It means the liberty of even less conscientious factory owners to make their money out of the toil, the labor, of little children. Men of this stamp are the men whose liberty would be preserved by Mr. Wilson. Men of this stamp are the men whose liberty would be preserved by the limitation of governmental power.

We propose, on the contrary, to extend governmental power in order to secure the liberty of the wage workers, of the men and women who toil in industry, to save the liberty of the oppressed from the oppressor. Mr. Wilson stands for the liberty of the oppressor to oppress. We stand for the limitation of his liberty thus to oppress those who are weaker than himself.

Source: Roosevelt, Theodore. "The Liberty of the People." Recorded September 22, 1912. Library of Congress Motion Picture, Broadcasting and Recorded Sound Division. Theodore Roosevelt Digital Library, Dickinson State University. https://theodorerooseveltcenter.org/Research/Digital-Library/Record?libID=o285075.

Topic 3
Reform in the Late 1800s and Early 1900s

Framing Question

To what extent were the progressives successful in their goals?

President Theodore "Teddy" Roosevelt visited Louisiana's Breton National Wildlife Refuge in 1915. More than a century later, the refuge remains part of the National Wilderness System and is home to more than twenty bird species, including the brown pelican (the state bird of Louisiana), the laughing gull, and the endangered piping plover.

Setting the Scene

Teddy Roosevelt: Friend of the Birds

In November 1902, President Theodore Roosevelt joins a bear-hunting expedition along the Yazoo River in Mississippi at the invitation of the state governor. On the second day of the hunt, the group's dogs chase a small bear into the swamp. One of the hunting guides subdues the exhausted bear and ties it to a tree, presenting it as a target for the president. But Roosevelt is an avid sportsman. In his eyes, there is nothing sporting about "hunting" a bear that is tied to a tree, and he refuses to shoot it. Within days, a political cartoon depicting Roosevelt's decision to spare the bear captures public attention and inspires a toymaker to make a stuffed animal that bears the president's name: the Teddy bear.

The creation of a popular toy, however, is not what makes this trip truly momentous. The excursion through Mississippi has exposed Roosevelt to the beauty and wildlife of the Southeast and inspired his commitment to conservation in the region. During this era, bird feathers are in high demand in the fashion industry. Certain bird species in Mississippi and Louisiana are being overhunted to the point of extinction or near extinction for their beautiful plumes. When Roosevelt learns of this, he signs an executive order that makes the Breton and Chandeleur Islands, located off the coast of Louisiana, federal wildlife refuges. Taking this action is part of Roosevelt's larger effort to protect wildlife and build what will become the U.S. National Wildlife Refuge System.

In 1915, several years after he leaves office, Roosevelt and his wife travel to New Orleans. Accompanied by officials from the Louisiana Conservation Commission, the Roosevelts visit the barrier islands that were protected by his executive order eleven years earlier. There, Roosevelt observes the region's growing bird populations, which many credit to his early conservation efforts. Motion picture footage, a relatively new invention, captures Roosevelt's inspections of and interactions with the birds. The resulting silent film, Roosevelt, Friend of the Birds, *will give people all around the United States the opportunity to witness the benefits and importance of conservation, just as Teddy, their former president, has.*

Populism and the People's Party

As you have read, the United States was a largely agrarian country from its founding through the 1800s. This began to change as the country industrialized. This new direction affected different groups in different ways and inspired various reactions, both political and social in nature.

Farmers were one group to react strongly to industrialization. While big business was transforming the country's growing cities and national economy, it was also changing the experiences of American farmers. Many farmers turned to **populism** to meet a number of new challenges.

The Rise of the Granger Movement

New technologies changed the way that factories and their workers operated during the 1800s, and they also changed the work of farmers. Machines and other devices increasingly replaced human and animal labor, saving farmers time and increasing their productivity—at a price. Soon, the efficient new equipment led to a glut of crops on the market. This drove prices lower and lower for farmers who had gone into debt to buy the equipment. When farmers further lowered their prices to compete with other farmers, they wound up selling their crops for less than the cost to produce them.

When the federal government failed to help farmers contend with these issues, they turned to homegrown organizations instead. These local chapters became known as Granges. Their members, the Grangers, were an important part of the growing populism movement. They realized there was strength in numbers and shifted their focus from education to political activism. Male and female members alike—though not African Americans, who were excluded from Granges—fought unfair business practices

The Granger movement emerged during the late 1800s to defend the collective interests of farmers. This illustration, inspired by the movement, emphasizes the important role that farmers played in the United States at the time.

and lobbied for state laws that would protect their interests.

Think Twice

How did the Granger movement work to help farmers?

Populist Frustration with Banks and Railroads

The influence wielded by banks and railroads proved a massive source of frustration for populists. Farmers also resented that the owners of these industries grew wealthy by profiting from the high costs and financial struggles that farmers faced. Farmers frequently needed to borrow money from banks to buy land, supplies, and machinery in hopes of increasing profits. Bank loans available to farmers had high interest rates, often higher than those offered to industrial businesses. The banks justified the higher rates by arguing that farming—and by extension, loaning money to farmers—was riskier than other businesses: Farmers could not control the weather, nor could they predict just how much they would produce over the course of the year.

But as crop surpluses overtook consumer demand, the high interest rates on loans contributed to a vicious cycle of debt. Farmers were unable to pay back their loans after each harvest as crop prices continued to drop, leading them to take out new loans to cover the costs of planting.

Populists also had to contend with unfair railroad practices. Across the country, railroads competed with one another for the business of large shippers and buyers by giving those customers discounted rates. Farmers, on the other hand, lived in more isolated parts of the country and relied on local railroads that catered to their region. These lines had no competition and could charge farmers much higher shipping rates. In addition, farmers had to pay a fee to use grain elevators; the grain elevators stored the farmers' crops until it was time to ship, at which point they would move, or "elevate," the grain from the silo into a railroad car. Because railroads controlled many grain elevators, they could charge storage fees and manipulate multiple steps in the grain distribution chain, deepening populists' frustrations over monopolistic practices.

During the 1870s, Grangers lobbied for and secured the passage of legislation to protect farmers from banks and railroads. State legislatures in Illinois, Iowa, Minnesota, and Wisconsin passed laws that limited the rates that grain storage companies and railroads could charge. These businesses responded by suing to overturn the laws, resulting in the "Granger cases" heard by the U.S. Supreme Court in 1877. In *Munn v. Illinois*, the court upheld an Illinois law that set a maximum rate for facilities that stored grain. The court's decision explained that the states can regulate private property—in this instance,

the grain storage facilities—"when such regulation becomes necessary for the public good."

Unfortunately for the Grangers, the court did not always rule in their favor, as was the case in *Wabash v. Illinois*. In that case, the court overturned a law that prevented railroads from discriminating against customers based on how far they were shipping their goods, on the basis that only the federal government, not the states, could regulate interstate commerce.

Think Twice

Why was the case *Munn v. Illinois* significant?

Free Silver Movement

Facing a worsening financial crisis, populists began to demand increased intervention from the federal government. One potential remedy was for the government to build silos for farmers to store their excess grain, allowing crop prices to rebound by reducing the surplus on the market. Another suggestion was that the federal government add more money to the economy to intentionally cause inflation. When inflation rises, interest rates on loans and other accounts typically increase. This means that the money borrowers pay back on their loans is worth less than the money they initially borrowed. As you can imagine, this idea was very popular with indebted farmers. It was also supported by other working people.

Rejecting these populist recommendations, Congress shifted the country to the gold standard in 1873. This meant that the government printed paper currency with different values that represented a certain amount of gold held in reserve and ensured the amount of paper currency in circulation matched the value of its gold reserves. This strategy increased the value of the dollar, which directly benefited lenders and harmed borrowers, many of whom were farmers.

Effect of Money Supply on Loans

Members of the Free Silver Movement wanted to increase the money supply to spark inflation, which would benefit them as they paid back money they had borrowed.

The Free Silver Movement arose in response to Congress's actions, with supporters advocating for **bimetallism**—a monetary system based on both gold *and* silver—to expand the money supply. This would cause the inflation that would benefit farmers and debtors. Though Congress mandated limited silver purchases with the passage of the Bland–Allison Act in 1878, populists were not satisfied. They resumed their call for bimetallism in the 1890s after a recent economic panic. This call would come around the same time as the formation of a new national political party.

Think Twice

What did populists hope would happen if bimetallism was adopted?

The People's Party

The Granger movement had resulted in the emergence of new organizations during the 1870s and 1880s, including the Farmers' Alliance. As its name indicates, the Farmers' Alliance, like the Granger movement, addressed issues that directly impacted farmers, including rising debt, low crop prices, and crop failures. One strategy was to form **cooperatives**, which helped members save money on equipment and supplies by offering lower prices than traditional retailers.

The Farmers' Alliance became increasingly radical and political in response to the mounting economic desperation that U.S. farmers faced. At first, the Farmers' Alliance focused its attention at the state level, where it enjoyed some success. Movement leaders eventually brought their cause to the national stage, forming the People's Party in 1892. This development reflected the populist view that the country's two major political parties, the Democrats and the Republicans, were not looking out for the interests of farmers.

While the People's Party, also known as the Populist Party, consisted mainly of farmers, its **platform** included a range of economic, political, and social policies that appealed to many reform-minded voters. In keeping with the earlier Granger movement, the platform promoted free silver along with the building of public silos to house surplus crops. The People's Party also advocated for the passage of a federal income tax that targeted wealthy Americans (accomplished in 1913 with the ratification of the Sixteenth Amendment) and an eight-hour workday for non-farmers. Additionally, the platform championed a national requirement to use secret ballots in elections and the direct election of U.S. senators, rather than having state legislatures elect them (accomplished in 1913 with the ratification of the Seventeenth Amendment).

Though the People's Party only ran one presidential candidate, its platform endured through the Democratic Party. This political cartoon, published in 1900, reflects the merger of the two parties.

The People's Party ran James B. Weaver for president in the 1892 presidential campaign, winning more than a million votes and carrying five Western and Midwestern states. Although they lost the presidency, populists won hundreds of local and state elections across the Midwest.

William Jennings Bryan was endorsed as the party's presidential candidate in 1896, though he ran as a Democrat. Bryan reignited the call for bimetallism, pointing to an economic panic in 1893 as proof that farmers and other workers needed an alternative to the gold standard. In a now-famous speech at the Democratic presidential convention, Bryan called upon Congress to take action, declaring, "You shall not press down upon the brow of labor this crown of thorns; you shall not crucify mankind upon a cross of gold."

The People's Party formally dissolved after Bryan lost the election to William McKinley, whose better-funded campaign that criticized Bryan's economic platform appealed to many workers. Within four years, the Democratic Party absorbed the People's Party. Many of the populist causes—including the federal income tax, direct election of U.S. senators, and the eight-hour workday—were championed by other reformers, whom you will read about later in this topic. The People's Party also showed that changing cultural, social, and economic priorities varied by region, and it reflected the wants and needs of people living in the Midwest and West.

Think Twice

How was the rise of the People's Party a response to economic instability among Western and Midwestern farmers?

PRIMARY SOURCE: POPULIST PARTY PLATFORM, 1896

The Populist Party (also known as the People's Party) adopted its political platform at a national convention in St. Louis, Missouri, in July 1896. The platform included a variety of policy goals, including free coinage of silver, a graduated income tax, and government ownership of the railroads.

The Finances . . .

2. We demand the free and unrestricted coinage of silver and gold at the present legal ratio of 16 to 1, without waiting for the consent of foreign nations. . . .

7. We demand a graduated income tax, to the end that aggregated wealth shall bear its just proportion of taxation, and we regard the recent decision of the Supreme Court relative to the income-tax law as a misinterpretation of the Constitution and an invasion of the rightful powers of Congress over the subject of taxation. . . .

Railroads and Telegraphs

1. Transportation being a means of exchange and a public necessity, the Government should own and operate the railroads in the interest of the people and on a non-partisan basis, to the end that all may be accorded the same treatment in transportation, and that the tyranny and political power now exercised by the great railroad corporations, which result in the impairment, if not the destruction of the political rights and personal liberties of the citizens, may be destroyed. Such ownership is to be accomplished gradually, in a manner consistent with sound public policy. . . .

4. The telegraph, like the Post Office system, being a necessity for the transmission of news, should be owned and operated by the Government in the interest of the people. . . .

The Referendum

We favor a system of direct legislation through the initiative and referendum, under proper Constitutional safeguards.

Direct Election of President and Senators by the People

We demand the election of President, Vice-President, and United States Senators by a direct vote of the people.

Source: Porter, Kirk H., comp. *National Party Platforms*. New York: Macmillan, 1924, pp. 196–199.

The Progressive Era

The Gilded Age of the late 1800s and the Second Industrial Revolution (1870–1914) overlapped with another significant time in American history: the Progressive Era, which began in the 1890s and lasted through the 1920s. To *progress* means to move forward or advance. The word *progressive*, however, held a very specific political meaning during the late nineteenth and early twentieth centuries. In that era, those who self-identified as progressive generally embraced change as a means of improving the world around them.

As you read in the previous topic, rapid industrialization had fundamentally reshaped the global economy, including in the United States. The consequences of these changes—which included advancements in technology, increased efficiency, and higher levels of production—were not universally positive. Industrial workers faced unsafe conditions in factories and mines, and they worked long hours for low wages. Living conditions for the urban poor were cramped and unsanitary. There was also an obvious and growing divide between the upper and lower classes. According to historian Eric Foner, the richest 1 percent of Americans owned more wealth than the other 99 percent combined by the year 1890. Such disparity fueled a growing anger and resentment toward the overly powerful "robber barons" who dominated society and the economy.

A lack of government involvement and oversight combined with corruption at the federal, state, and local levels made matters worse. The federal government continued its laissez-faire approach to the economy. With few regulations in place, corporations and individual fortunes grew unimpeded, often at the expense of workers. Meanwhile, political machines such as Tammany Hall had elevated corruption to an art form at widespread state and local levels.

Having kept a watchful eye on these issues for years, turn-of-the-century political progressives knew that the time was ripe for meaningful social, economic, and political change—and that government activism might be the way to make that change happen. They worked to pass new laws, public policies, regulations, and rules to address the many issues that stemmed from rapid industrialization and urbanization. It would take the work of numerous groups to bring about such massive change, including journalists, social reformers, civil rights activists, suffragists, labor organizers, and government officials. In many instances, these groups worked together on different parts of the same issue at the same time.

Think Twice

What is a political progressive?

The Muckrakers

Among its many achievements, the Second Industrial Revolution changed the way people accessed information during the late 1800s and early 1900s. New technologies made it faster and cheaper for publishers to print newspapers, magazines, and books. Meanwhile, lower postage rates through the Postal Act of 1879 and new modes of transportation made it easier and less expensive to deliver printed materials directly to readers, expanding their circulation. Beyond increasing Americans' access to print media, these changes had another significant effect: Journalists embraced their growing responsibility to inform the public, not just about daily events, but also about deeper problems in society. They understood a key truth: People cannot fix a problem unless they know it exists.

As you have learned, little government regulation existed in the late nineteenth century. There were no workplace inspections, which meant there were no formal protections for employee health or safety. There were few resources to help the urban poor, and there were few if any building codes preventing the construction and existence of unsafe and unsanitary tenements. Yet these poor working and living conditions were unknown to the general public unless they actually experienced them or knew someone who did.

Samuel Sidney McClure founded *McClure's Magazine* in 1893. Soon known for its muckraking journalism, *McClure's* featured investigative nonfiction, realistic fiction, and literary fiction. It published work by writers such as Mark Twain and Jack London.

Muckrakers were investigative journalists who "raked the muck"—a metaphor for bringing society's problems to light. Although *muckraker* was originally used as a criticism, many of these journalists embraced the label as a badge of honor. The muckrakers covered a diverse range of issues and, like other progressives of the time, emphasized the inherent connections among democracy, government, and positive social and economic change. Muckraking journalism took off at the turn of the twentieth century,

thanks in part to *McClure's Magazine*. Using serialized publication, the magazine released smaller parts of larger investigative works over the course of months; eventually, the investigations were compiled and published as stand-alone books. The muckrakers' writings captivated Americans from all walks of life and contributed to demands for economic and social change.

Think Twice

How were muckrakers able to attract as much attention to issues as they did?

Upton Sinclair and Food Safety

Upton Sinclair was a muckraker and progressive reformer who championed a variety of causes, including free speech, workers' rights, and poverty relief. He is best remembered for the impact his work had on food and drug safety in the United States. In 1905, Sinclair spent seven weeks as an undercover reporter investigating stockyards in Chicago on behalf of the weekly socialist publication *Appeal to Reason*.

What Sinclair witnessed was shocking: dangerous working conditions, animal cruelty, and unsanitary food processing practices, all of which he exposed in his novel *The Jungle*, which blended fictional narrative with journalistic detail. *Appeal to Reason* published a serialized version of the novel in 1905, and it was later published as a book in 1906.

Upton Sinclair's revelations in *The Jungle* shocked readers and prompted a progressive response at the presidential level.

Sinclair's initial goal for *The Jungle* was to raise public sympathy for workers in the meatpacking industry, but as the writer later observed, "I aimed at the public's heart, and by accident I hit it in the stomach." *The Jungle* fueled the public's outrage over the unsanitary conditions in which their food was being produced, which pressured the federal government to pass two groundbreaking laws in 1906. You will read more about these later in the topic.

Think Twice

Why was Upton Sinclair's *The Jungle* significant?

Ida Tarbell and Standard Oil

Ida Tarbell focused her reporting on the corporations and monopolies that dominated the U.S. economy, particularly

John D. Rockefeller's Standard Oil Company, a corporation whose practices had harmed her own family's small oil business in western Pennsylvania. In 1871, the Tarbells and other independent oil companies were blindsided by a scheme between a group of large refiners (Rockefeller included) called the South Improvement Company (SIC) and the Pennsylvania Railroad Company. The railroad would raise its rates on smaller refiners and pay rebates to the SIC members as a way to reduce competition within the oil industry.

In the mid-1890s, Ida Tarbell went to work for *McClure's Magazine*. In 1902, she published a story in the magazine about corporate corruption—specifically, the unethical practices of Rockefeller and Standard Oil. "The History of the Standard Oil Company" was so popular that the magazine expanded the series from three parts to nineteen. Public outrage over the revelations in Tarbell's exposé, including Rockefeller's use of corporate spies and deceptive pricing, contributed to the eventual breakup of Standard Oil by the Supreme Court under the Sherman Antitrust Act in 1911.

Think Twice

What types of details did Tarbell's exposé reveal about Rockefeller and Standard Oil? What were the effects?

Exposing Living and Working Conditions

In Topic 2, you read briefly about photographer and journalist Jacob Riis. His work preceded the muckrakers but influenced many progressive reformers, including the settlement house movement, which you'll read about shortly.

Riis's book was highly impactful. Readers were shocked by his photographs of adults and children living in squalid tenements, dressed in threadbare clothing. New York City's government responded to Riis's work and the work of other reformers by establishing the Tenement House Department and passing new laws, including the Tenement Act of 1901. Among this legislation was a mandate that apartment buildings be constructed with central courtyards so that interior apartments had access to natural light and fresh air—a vast improvement over the tenements you learned about in Topic 2.

Journalists also dug into the unsafe working conditions endured by workers across the United States. Between 1902 and 1907, the International Association of Factory Inspectors published *The Factory Inspector*, a journal that included data about industrial accidents collected from state labor bureaus. The journal revealed that some of the worst accidents occurred in steel mills, including explosions, fires, and molten metal run amok. Additionally, immigrant workers were more

likely to be involved in an accident than U.S.-born workers.

At the same time, journalists such as William B. Hard and Charles Rumford Walker began publishing gruesome firsthand accounts from mill workers. Their writing underscored that owners and corporations had the means to improve worker safety, but they had little incentive to do so because they rarely had to compensate the families of employees who died on the job.

While the revelations by *The Factory Inspector*, Hard, and Walker startled many Americans, one book in particular spurred widespread action. Crystal Eastman published her highly influential book *Work Accidents and the Law* in 1910 to answer two questions: Who paid the greatest economic cost of the accidents, and who was to blame for workplace accidents? After investigating hundreds of individual workplace accidents that involved injuries and deaths, Eastman's conclusions were clear: Workers, not employers, bore the greater economic cost of workplace accidents, and factory owners carried significant responsibility for workplace accidents.

Work Accidents and the Law helped shift the mindset of employers. Instead of considering workplace injuries as an unfortunate fact of life, they started to see them as a problem that could and should be solved. Employers realized something else as well: Fewer workplace accidents saved industrialists and their businesses from being tried in the court of public opinion. Some corporations, eager to avoid legal scrutiny and protect their reputations, began instituting health and safety programs on their own. At the same time, states formed industrial commissions to help keep factory laws up-to-date and to oversee workers' compensation programs. Increased pressure from unions in the twentieth century also helped improve workplace health and safety.

Think Twice

How did muckrakers impact workplace health and safety?

Triangle Shirtwaist Factory

While muckrakers exposed industrial abuses and revealed the poor working conditions in factories, a tragic event in 1911 further directed national attention to the issue. A fire at the Triangle Shirtwaist Factory, a crowded sweatshop in New York City, highlighted the dangerous and often deadly conditions endured by factory workers.

The Triangle Shirtwaist Factory primarily employed young immigrant women, who worked thirteen hours a day sewing blouses for six dollars a week. The factory managers frequently locked the exterior doors and prevented the workers from using the bathroom to increase their productivity. To make matters worse, the building was poorly

maintained and had minimal ventilation, and the floor was covered with flammable scraps of fabric. The workers demanded improved building safety and working conditions, but management ignored them.

A fire started in the sweatshop on March 25 and spread quickly through the building. Although fire hoses were installed, they were nonfunctional, and the building had only a single, inadequate fire escape. The firefighters' ladder was too short to reach the tenth floor of the building where the Triangle Shirtwaist Factory was located. Some workers jumped from windows or into the empty elevator shaft to escape the blaze. All told, 146 people—mostly young women—died in the tragedy.

Newspapers across the United States carried the story, and hundreds of thousands of people joined the funeral procession held for the workers in New York City. In June of that year, the New York state legislature organized the Factory Investigating Commission, which visited almost two thousand factories across the state. In the years that followed, progressives and legislators passed more than

The Triangle Shirtwaist Factory fire led to protests in New York City. Many of the protests included unions, whose often-large memberships understood the tragedy to be an opportunity to spur government officials to action.

thirty new workplace health and safety laws in New York state, including new fire codes for factories and restrictions on child labor.

Think Twice

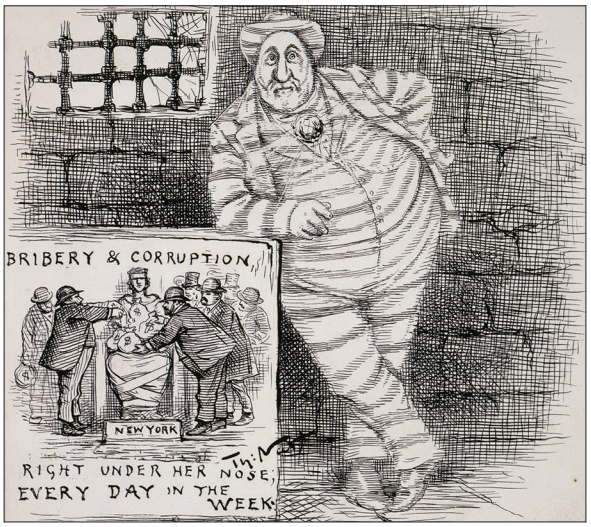
How did the Triangle Shirtwaist Factory fire lead to progressive reform?

Political Corruption

While politicians were passing new laws focused on improving living and working conditions, many were also being investigated by muckrakers, who were intent on exposing the depth and effects of political corruption.

While many muckrakers exposed corruption through books and articles, one reformer took a different approach. During the 1870s, illustrator Thomas Nast set his sights on political corruption in New York City and began publishing cartoons that exposed Tammany Hall and its infamous boss, William Tweed. Nast's cartoons, along with the work of other reformers such as attorney Samuel J. Tilden, contributed to Tweed's conviction and imprisonment.

Lincoln Steffens was another prominent anti-corruption muckraker of the time who eventually became managing editor of *McClure's Magazine*. Steffens began writing a series of articles around this time, later published in a single volume titled *The Shame of the Cities*, that exposed corruption at the



Thomas Nast helped expose William Tweed's corruption, weakening the influence of Tammany Hall. When Tweed was later arrested in Spain following an escape from prison, the authorities who captured him said they recognized him from Nast's enormously popular cartoons.

municipal level. Later, he went on lecture tours around the United States, during which he helped answer Americans' questions about the unethical relationships between business and government.

Think Twice

How were Thomas Nast and Lincoln Steffens similar?

Child Labor

Progressive Era reformers also targeted child labor. By 1900, only about half of U.S. states had child labor laws, and many were poorly enforced. At the federal level, only a single labor standard applied to children, offering little real protection. Many believed that stronger legislation was needed to address

the issue—but at what level of government? Did the federal government have the responsibility to regulate child labor, or did the states?

A national movement to end child labor gained momentum at the turn of the twentieth century. In 1904, progressive reformers organized the National Child Labor Committee (NCLC). Four years later, in 1908, the NCLC hired Lewis Hine, a photographer, to take photos and collect the stories of child laborers around the country. Hine's grim photographs sparked public outrage and increased pressure on lawmakers to take action.

In 1916, Congress passed the Keating–Owen Child Labor Act. Similar to other legislation you learned about in earlier topics, this law was based on Congress's ability to regulate interstate commerce, or trade between the states. Factories and shops could no longer ship their products across state lines if they employed anyone younger than fourteen; the same rule applied to mills that employed children younger than sixteen. Additionally, no business could ship its products to another state if it employed child laborers younger than sixteen who worked more than eight hours a day or at night.

The law was challenged in front of the Supreme Court in the case *Hammer v. Dagenhart* in 1918. In his dissent, Justice Oliver Wendell Holmes wrote, "If there is any matter upon which civilized countries have agreed . . . it is the evil of . . . child labor." But Holmes's words did not resonate with his fellow members of the bench. The majority of the court disagreed with him, ruling 5–4 that regulating child labor was not a part of Congress's constitutional power to regulate interstate trade.

Shortly after the court issued this decision, Congress attempted again to regulate child labor by passing the Child Labor Tax Law as part of the Revenue Act of 1919. But this was also struck down by the Supreme Court. It was not until 1938 that meaningful federal child labor protections were established under the Fair Labor Standards Act of 1938. The Supreme Court overturned its earlier decision in *Hammer v. Dagenhart* when it upheld this law in 1941.

Think Twice

What successes and failures did the progressives experience while attempting to outlaw child labor?

Ida B. Wells and Anti-Lynching Reform

Ida B. Wells was another prominent journalist and activist during the Progressive Era. Born into slavery in Mississippi in 1862, Wells attended a freedmen's school before becoming a teacher at just fourteen years old. In 1891, Wells published a series of

PRIMARY SOURCE: "IDA B. WELLS IN TOWN," *THE TOPEKA STATE JOURNAL*, 1895

Journalist Ida B. Wells's reports and analyses showed that lynchings were used primarily to terrorize African American communities, not to punish criminal behavior as defenders of the practice claimed. The following is an excerpt from an interview with Wells.

"It is my life work," she said, "and I have studied it well. The facts have been so distorted that the people in the north and elsewhere do not realize the extent of the lynchings in the south. Since 1882 2,000 colored people have been lynched in the south. The number has steadily increased since the war until in 1894 it reached 200; four of those were women and three of them were burned. People in the north are led by the Associated Press reports, and the telegraph, which of course are owned in the south by the people of the south, that all these lynchings are to expiate atrocious crimes on women and children. I have indisputable evidence to prove that is not so. . . .

"I was forced into this work by the lynching of three of my personal friends at Memphis, Tenn., on the 9th of May, 1892. I had quit teaching school then, and had established in successful operation a newspaper which we called the Free Speech.

". . . In the next issue of my paper I printed an editorial denouncing the lynchers and the officers that allowed it. The daily papers advised that I be lynched and a committee waited on me, but I had gone to New York. They sacked the office, chased my business manager out of the city, and I was informed that if I came back I would certainly be lynched, as the trains were being watched. I have not been back, but I immediately began my crusade against lynching in the south and I shall continue it. Anti-lynching clubs are being formed all over the United States where I have been for the purpose of educating the people on the subject. I have confidence enough in the American people to believe that if they are once acquainted with the exact facts the practice will be stamped out."

Source: "Ida B. Wells in Town." *The Topeka State Journal*, June 8, 1895. Saturday Evening Edition, p. 3, col. 4.

newspaper articles under a pen name that expressed her views about the limited education opportunities available to African American students. Although she remained anonymous, school officials identified her as the author and dismissed her from her teaching position.

Wells saw this act of retribution as an opportunity, making the choice to leave teaching to become a journalist in Memphis, Tennessee. In 1892, she began writing about **lynchings** in the South after her friend Thomas Moss and two of his business partners were murdered in Memphis. The three men had been in jail and under police custody after being falsely accused of a crime. They were later lynched by a white mob.

During the 1800s and through the mid-1900s, mobs, mostly in the South, used lynchings to terrorize and control African Americans and other minorities, as well as white people who spoke out against lynching. Wells investigated the Moss case and published her findings, including the legal inconsistencies and racial prejudices she identified, in the newspaper she co-owned, the *Free Speech and Headlight*. In response to her editorials, a white mob set the newspaper office on fire.

The events in Memphis strengthened Wells's resolve. Later that year, she published the pamphlet *Southern Horrors: Lynch Law in All Its Phases*, along with other reports that appeared in newspapers. Wells became a prominent civil rights leader and anti-lynching advocate, giving lectures on the topic around the United States and overseas. She also worked to encourage legislators to pass federal anti-lynching legislation, though this would not happen during her lifetime. Such legislation would allow the federal government to prosecute lynching as murder, which states were not doing. In addition to her anti-lynching work, Wells was also active in the women's suffrage movement. She cofounded the National Association of Colored Women in 1896 and was a founding member of the National Association for the Advancement of Colored People (NAACP). You will read more about these reform movements later in the topic.

Think Twice

How were Ida B. Wells's goals similar to and different from those of other muckrakers?

Social Reformers

While muckrakers exposed social, economic, and political problems through investigative journalism, social reformers took direct action to improve the lives of people who were frequently unable to advocate for themselves, such as immigrants, impoverished families, and children. Social reformers worked to support a variety

of causes, including helping poor urban workers, expanding access to education, improving health care, and legislating against social ills.

Settlement Houses

Settlement houses, an important fixture of urban reform in poor immigrant neighborhoods, were named for how reformers moved to or "settled" in the impoverished neighborhoods where they worked. By living in these neighborhoods, reformers could learn firsthand about the conditions the urban poor faced and identify their greatest needs. They could also learn about the distinct cultures of the populations they worked with while building trust. Many settlement house workers were educated women who came from privileged backgrounds, often motivated by their religious beliefs, a desire to make education more accessible and democracy more widespread, or interest in sociological research. These volunteers worked to improve the economic well-being of immigrants and help them adapt to American culture.

The American settlement house movement began with Jane Addams and Ellen Gates

Hull House started an open-air school for children afflicted with tuberculosis, allowing them to enjoy fresh air while they learned. Here, students rest on one of the rooftops of the Hull House complex between lessons.

Starr. After graduating from Rockford Female Seminary, now Rockford University, in Illinois, the two friends visited England. While there, they toured a settlement house called Toynbee Hall, located in London's East End. This experience inspired them to found Hull House in Chicago in 1889, making it one of the first settlement houses in the United States.

Each week, volunteers at Hull House helped thousands of people. Addams and Starr established a kindergarten and daycare to help working mothers. They provided English-language classes and cooking classes as well as job training and job placement services—all services that helped immigrants assimilate to life in the United States. In less than twenty years, Hull House grew to include an art gallery, community kitchen, gymnasium, music school, and theater. It also became an important training ground for other social reformers and social workers at the time.

These reformers' efforts were not limited to Hull House. Addams and others collaborated closely with neighborhood residents to successfully lobby for a juvenile court system, improved urban sanitation measures, more playgrounds, factory safety laws, and legislation that protected female workers.

Approximately four hundred settlement houses were founded across the United States between 1889 and 1910, providing support, kindness, and aid to a wide array of groups, including African American, Chinese, Dutch, German, Irish, Italian, Jewish, Mexican, Native American, and Polish populations. Settlement houses remained important institutions in urban communities through World War I. As the twentieth century progressed, federal, state, and local governments, as well as nonprofit organizations, played a greater role in alleviating urban poverty. Many of the original settlement houses still exist today and serve as community centers.

Think Twice

How did settlement houses improve the lives of immigrants and the urban poor?

Public Education and Health Reform

During the late 1800s and early 1900s, progressive reformers emphasized public education as a way to instill civic values and prepare children for democratic participation. For many reformers, it was also a tool to assimilate immigrant children by promoting the English language and mainstream cultural norms.

During the nineteenth century, public education was not nearly as commonplace in the United States as it is today. As you have read, for many families, children's time was considered better spent working on the family farm or in a factory or mine than

in a schoolhouse. In 1852, Massachusetts became the first state to pass a compulsory education law. By 1890, twenty-seven states and territories had similar laws, and by 1918, all states had them. These laws required that students remain in school until a certain age, depending on the state; this age could be as young as seven or as old as sixteen. Enforcement of compulsory education laws varied from state to state, as did who qualified for exemptions from the laws.

Typically, compulsory education laws required that children go to elementary school so that all Americans would attain a basic level of education. During the late 1800s, most students who attended high school were from middle- and upper-class families that did not rely on their children's wages for survival. A high school education opened the door to professional jobs and, in some instances, a college education. As wages improved during the early 1900s, more working-class families were able to send their children to high school.

In addition to the traditional classroom curriculum, reformers increasingly offered vocational programs that taught students specific trades. This created a greater incentive for parents to keep their children in school because they would graduate with a skill that could then set them up for a career. Reformers did not necessarily promote vocational programs as a mode of upward mobility. Instead, they viewed vocational

An Early Champion for Mental Health

Although most of Dorothea Dix's accomplishments predated the Progressive Era, her work as a social reformer was highly influential on activists who came after her. Dix (1802–87) began her career as a teacher in Boston. After leaving teaching due to illness, Dix began volunteering at a local jail, where she taught Sunday school to incarcerated women. Her experience proved transformative.

Dix had expected to work with women convicted of crimes. Instead, she discovered that many of the women were suffering from mental illness. At a time when there were few, if any, effective treatments for mental illness, the state had opted to jail the women because they were unwell. To make matters worse, the women were treated cruelly, confined to a single dirty room and clothed in garments that did little to keep them warm in the winter.

Dix resolved to change the system. She traveled from state to state to study how inmates were treated in jails, almshouses, and prisons. She successfully campaigned for states to build separate hospitals and locations dedicated to caring for people with mental health needs, resulting in the construction of more than a hundred new mental health hospitals around the United States.

training as a way to help people achieve their potential within their social class.

Public health was also a focus of many social reformers of the Progressive Era, who responded to the inadequate and unsanitary health conditions in the United States' rapidly growing cities. Insufficient plumbing, municipal sewers, and waste removal meant that diseases such as cholera, polio, tuberculosis, and typhus spread quickly. Children and pregnant women were especially susceptible. A lack of available health education compounded matters.

Think Twice

Why did reformers work to expand public education during the Progressive Era?

Civil Rights During the Progressive Era

To understand the civil rights challenges faced during the Progressive Era, it is important to recall the gains made and the promises broken during the Reconstruction era that followed the Civil War. During Reconstruction, Radical Republicans in Congress enacted their vision to reshape Southern society, including efforts to increase African American political participation. Recall that to be readmitted to the Union, former Confederate states were required to draft new constitutions. These constitutions had to abolish Black Codes and guarantee certain rights to African American citizens. Black delegates also played a role in drafting these constitutions. For example, half of the delegates to Louisiana's 1868 constitutional convention were African American. For the first time in the country's history, African American leaders held office in state legislatures and the U.S. Congress.

As you learned, these victories were short-lived. Reconstruction ended in 1877, and Congress withdrew federal troops from the South. Southern Democrats regained control of state legislatures and passed Jim Crow laws, which included repressive statutes that restricted movement, prohibited interracial marriage, and enforced racial segregation in public spaces.

Other laws and practices also led to voter suppression. This included the introduction of literacy tests administered when a person went to register to vote. Prospective African American voters were given tests that were prohibitively difficult and that white voters would have generally failed as well—but white men were presented with an easier version that posed no meaningful barrier to voting rights. Other laws made an exception for prospective voters who failed a literacy test, or otherwise did not meet the voting requirements, if they were descendants of past voters. These so-called grandfather clauses allowed white voters to bypass

restrictions that would have prevented them from casting their ballots, while African Americans were granted no such loophole.

In 1890, a new law in Louisiana entrenched de jure segregation, or segregation imposed by law, in the South. That year, the Louisiana State Legislature passed the Separate Car Act. This law required African Americans to sit in separate railway cars from white passengers. A group called *Comité de Citoyens* (Committee of Citizens) recruited Homer Plessy, who was mixed-race, to challenge the law. Plessy bought a ticket to travel from New Orleans to Covington and intentionally sat in the "whites only" car. He was arrested when he refused to move to the car for African American passengers. Plessy then challenged his arrest in court.

Plessy's case eventually reached the Supreme Court. His lawyers argued in *Plessy v. Ferguson* that the Separate Car Act was unconstitutional—separate cars for passengers based on race violated the equal protection guaranteed under the Fourteenth Amendment. But the court overwhelmingly disagreed. The justices ruled in a 7–1 decision that segregation was not illegal as long as the facilities for different races were the same. The ruling in *Plessy v. Ferguson* was consequential: It did not just uphold Jim Crow laws but also *reinforced* them by establishing the principle of "separate but equal."

The *Plessy* ruling emboldened Louisiana and other Southern states to pass even more restrictive laws. For example, Louisiana's constitution of 1898—a far cry from the state constitution of 1868 that you read about at the end of Unit 1—included poll taxes, literacy tests, and other measures designed to disenfranchise African American men, resulting in a 90 percent drop in their voter registration. These restrictions, along with similar laws across the South, remained in place for decades, helping maintain the racial and political status quo until the Civil Rights Movement of the 1950s and 1960s.

In the North, many African Americans encountered de facto segregation, or segregation that exists but is not imposed by law. Discriminatory practices pervaded school districts, workplaces, and communities, resulting in inequality of education, wages, and community resources.

Although slavery had been abolished, rigid racial hierarchies remained deeply entrenched. Segregation and rampant discrimination affected countless aspects of African Americans' lives. Widespread job discrimination kept many African Americans confined to low-wage labor, perpetuating cycles of poverty. Schools for African American students lacked resources, and the education they received was often inferior to that available to white students.

African Americans were restricted from equal access to public spaces and transportation under newly codified Jim Crow laws, making travel and daily life significantly more difficult.

PRIMARY SOURCE: *PLESSY v. FERGUSON*, 1896

Homer Plessy challenged Louisiana's Separate Car Act, arguing that it violated the Fourteenth Amendment's equal protection clause. The following is an excerpt from the Supreme Court's majority opinion, in which it upheld the state's policy of segregation on railway cars.

The object of the amendment was undoubtedly to enforce the absolute equality of the two races before the law, but in the nature of things it could not have been intended to abolish distinctions based upon color, or to enforce social, as distinguished from political equality, or a commingling of the two races upon terms unsatisfactory to either. Laws permitting, and even requiring, their separation in places where they are liable to be brought into contact do not necessarily imply the inferiority of either race to the other, and have been generally, if not universally, recognized as within the competency of the state legislatures in the exercise of their police power. The most common instance of this is connected with the establishment of separate schools for white and colored children, which has been held to be a valid exercise of the legislative power even by courts of States where the political rights of the colored race have been longest and most earnestly enforced.

Source: Plessy v. Ferguson. 163 U.S. 537 (1896).

They also faced constant threats to their personal safety. In Unit 1, you read about the rise of white supremacist groups such as the Ku Klux Klan and the Knights of the White Camelia. These groups emerged during Reconstruction and used violence and terror to restrict African Americans' rights and mobility. Even when the popularity of these groups waned, the threat of lynchings and other acts of violence persisted.

Despite these barriers, African Americans actively resisted inequality. And in the late 1800s, progressive activists and reformers worked to attain the civil rights promised to African Americans by the U.S. Constitution, the Bill of Rights, and the Reconstruction Amendments. Booker T. Washington and W. E. B. Du Bois emerged as two of the most influential leaders of the movement, but as you will soon read, they differed greatly in their approach to advancing the interests of African Americans.

Think Twice

Why was the ruling in *Plessy v. Ferguson* significant?

Booker T. Washington

Booker T. Washington (1856–1915) was born into slavery in Virginia and moved with his family to West Virginia after emancipation. Washington's family, like so many other formerly enslaved families at the time, was very poor and could not afford for him to attend school; he began working at the age of nine. But this did not stop him from attaining an education. In 1872, he enrolled at Hampton Normal and Agricultural Institute, recently established to provide vocational and other education to Southern African Americans, and paid his tuition by working as a janitor. Washington graduated three years later and began teaching.

In 1881, Washington was appointed director of the newly formed Tuskegee Institute in Alabama. The Tuskegee Institute was both academic and vocational. African American students could study subjects such as geography and applied mathematics and also learn a variety of skilled trades, including brickmaking, carpentry, home economics, and printing. In a little more than thirty years, the Tuskegee Institute expanded its curriculum to include nearly forty trades and professional subjects, employed nearly two hundred faculty, and had an enrollment of about 1,500 students.

Washington's commitment to and work with the Tuskegee Institute reflected his core belief that African Americans should focus on economic security first and political and social equality second. Rather than directly challenging segregation and political disenfranchisement, Washington encouraged African Americans to pursue educational and economic opportunities to erode the long-standing divisions between Black and white Americans. Washington believed that educational and economic advancement would gradually reduce racial inequality, a position some later described as **accommodationist**.

Washington gained national attention for these views in 1895. On September 18, he gave a speech to a crowd of three thousand people at the Atlanta Exposition, an agricultural and trade fair organized to show off the resurgence of the postwar Southern economy. In his speech, Washington allayed the concerns of some white Americans by downplaying a desire for social integration. He explained that socially, Black and white Americans could "be as separate as the fingers, yet one as the hand in all things essential to mutual progress." Washington emphasized that African Americans and white Americans shared responsibility for economic prosperity. He also reinforced his view that African Americans should focus on education and economic well-being rather than directly challenge the status quo in the South, saying:

> To those of my race who . . . underestimate the importance of cultivating friendly

> relations with the Southern white man, . . . I would say: "Cast down your bucket where you are"—cast it down in making friends in every manly way of the people of all races by whom we are surrounded. Cast it down in agriculture, mechanics, in commerce, in domestic service, and in the professions. . . . No race can prosper till it learns that there is as much dignity in tilling a field as in writing a poem. It is at the bottom of life we must begin, and not at the top.

Washington's speech was printed in newspapers across the country, and his words were applauded by white and Black Americans alike. The speech cemented Washington's position as a national figure and leader as well as an adviser to Presidents Theodore Roosevelt and William Howard Taft.

Upon delivering his speech at the Atlanta Exposition, Booker T. Washington received a standing ovation.

Think Twice

According to Booker T. Washington, how should African Americans during the late 1800s and early 1900s effect change?

W. E. B. Du Bois

W. E. B. Du Bois (1868–1963) was a social scientist and activist. Unlike Booker T. Washington, he was not born into slavery. In 1888, he graduated from Fisk University, a historically Black college in Nashville, Tennessee. Du Bois became the first African American to earn a PhD from Harvard University. In addition to studying history at Harvard and after graduation, he also studied social sciences. Unlike many of his contemporaries, Du Bois relied on empirical data—that which is observed or experienced—to study the effects of systemic racism on African Americans. For example, from August 1896 to December 1897, Du Bois interviewed thousands of people in Philadelphia to determine the effects of racism. He then used the information he collected, along with census data, to create detailed visual representations of what he found, including the impacts of racism on opportunities available to African Americans. His work led him to reach the conclusion that "the

PRIMARY SOURCE: *THE SOULS OF BLACK FOLK*, W. E. B. DU BOIS, 1903

In the excerpt below, W. E. B. Du Bois addresses Booker T. Washington's approach to civil rights activism and his willingness to accept delayed civil rights.

W. E. B. Du Bois emerged as a leading opponent to Booker T. Washington's view that African Americans should focus on education and economic development over social and political equality and civil rights.

Mr. Washington distinctly asks that black people give up, at least for the present, three things,—

First, political power,

Second, insistence on civil rights,

Third, higher education of Negro youth,—

and concentrate all their energies on industrial education, the accumulation of wealth, and the conciliation [placating] of the South. This policy has been courageously and insistently advocated for over fifteen years, and has been triumphant for perhaps ten years. As a result of this tender of the palm-branch, what has been the return? In these years there have occurred:

1. The disfranchisement of the Negro.
2. The legal creation of a distinct status of civil inferiority for the Negro.
3. The steady withdrawal of aid from institutions for the higher training of the Negro.

These movements are not, to be sure, direct results of Mr. Washington's teachings; but his propaganda has, without a shadow of doubt, helped their speedier accomplishment. The question then comes: Is it possible, and probable, that nine millions of men can make effective progress in economic lines if they are deprived of political rights, made a servile caste, and allowed only the most meagre chance for developing their exceptional men? If history and reason give any distinct answer to these questions, it is an emphatic *No*.

Source: Du Bois, W. E. B. *The Souls of Black Folk*. Chicago: A. C. McClurg, 1903, pp. 51–52.

problem of the twentieth century is the problem of the color line."

Unlike Booker T. Washington, Du Bois believed that talented, highly educated African American leaders should actively pursue the restoration of civil and political rights for all Black Americans. In 1903, he published his most famous work, *The Souls of Black Folk*. In it, he challenged Washington's accommodationist practices, arguing that accepting discrimination, even in the short term, perpetuated the oppression of African Americans.

In 1905, Du Bois and twenty-eight other civil rights activists—both men and women—organized the Niagara Movement, named for the location of their meeting: Niagara Falls in Ontario, Canada. The group initially met in Buffalo, New York. However, they were forced to relocate to nearby Canada after hotels in the U.S. city refused to accommodate them.

Members of the Niagara Movement pose for a photo during a meeting in 1907. Infighting and external pressures caused the organization to dissolve in 1909.

At this first meeting, members of the Niagara Movement adopted the Declaration of Principles, which outlined the organization's views and demands. In the document, members advocated that African Americans "protest emphatically and continually against the curtailment of their political rights," putting the Niagara Movement in direct opposition to Booker T. Washington's accommodationist platform. The document went on to oppose laws that made it difficult for African Americans to attain economic equality and to demand equal treatment in employment and in labor unions. Other demands included an end to segregation; free, compulsory education for all American children; and better public school facilities and vocational schools, especially in the South. The Declaration of Principles ended by outlining specific duties of African Americans, including the duties to vote, work, obey the law, send their children to school, and respect themselves and others. The declaration communicated the Niagara Movement's belief that African Americans needed to urgently and consistently resist the unequal treatment they encountered on a daily basis.

In 1909, members of the Niagara Movement, other African Americans, and some white civil rights activists formed the National Association for the Advancement of Colored People (NAACP). The NAACP was a direct response to a deadly race riot in Springfield, Illinois, during which thousands of white people burned the homes and businesses of African Americans. Two Black people were also killed by lynching during the riot.

The NAACP worked to end segregation and racial discrimination in areas such as education, employment, housing, and voting. To this end, its members lobbied the federal government for the passage of new civil rights legislation and pushed to overturn existing laws through judicial rulings. The NAACP also worked to educate the public on important issues facing African Americans. One way it did this was through its magazine, *The Crisis*, of which W. E. B. Du Bois was a longtime editor. By 1920, the magazine had as many as a hundred thousand readers. Its articles promoted activism and criticized labor unions for excluding African American workers. It also provided statistics and details about lynchings across the United States; ongoing pressure from the NAACP eventually convinced President Woodrow Wilson to condemn the practice in 1918. The NAACP would become instrumental in the fight for civil rights in the mid-twentieth century, including by helping overturn the principle of "separate but equal" that had codified segregation into law as part of the *Plessy v. Ferguson* ruling. The organization remains active and influential today.

Think Twice

How did W. E. B. Du Bois's philosophy differ from that of Booker T. Washington?

Historically Black Colleges and Universities

Historically Black Colleges and Universities (HBCUs) are institutions of higher learning that were founded to provide African American students with higher education opportunities during a time of legal segregation and widespread racial discrimination. As a result, these institutions both are an important part of U.S. history and played a vital role in the ongoing pursuit of educational equality. The first HBCU, present-day Cheyney University, was founded in 1837 in Cheyney, Pennsylvania, just outside of Philadelphia. Three more HBCUs—Miner Normal School in Washington, D.C.; Lincoln University in Pennsylvania; and Wilberforce University in Ohio—were established between 1851 and 1856. Most HBCUs were founded between the end of the Civil War and 1900, primarily in Southern states.

At their founding, HBCUs provided African American students with the educational opportunities they were denied at other colleges and schools, especially the ability to learn and grow in a space created to foster dignity, belonging, and academic success. These institutions have proven instrumental in empowering generations of Black artists, doctors, educators, lawyers, scientists, and other professionals who have contributed to the United States socially, politically, and economically. Approximately one hundred HBCUs still educate African American students and students of other races today.

Beyond education, HBCUs have played an important role in advancing racial and social equality for African Americans. They are also integral to fostering a sense of community and preserving and honoring African American culture and history.

Louisiana is home to six HBCUs. The state's first HBCU, Southern University, was established in 1881 in response to an 1879 constitutional mandate for "the education of persons of color." The state's other five HBCUs are Dillard University, Grambling State University, Southern University at New Orleans, Southern University at Shreveport, and Xavier University of Louisiana. These schools offer a variety of undergraduate and graduate programs and have produced many notable alumni. Louisiana's HBCUs also play a major role in the state's economy, creating thousands of jobs and generating millions of dollars as a result of local spending in their surrounding communities.

Think Twice

Why were Historically Black Colleges and Universities (HBCUs) founded during the 1800s and early 1900s?

Women's Suffrage Movement

The women's suffrage movement was a significant part of the Progressive Era. You have already read about the close, and at times contentious, connection between the women's rights and abolitionist movements before and shortly after the Civil War. However, efforts to secure the franchise for women started long before then. In fact, women began challenging the status quo and writing in favor of expanded rights before the United States was an independent country.

In 1773, Phillis Wheatley, an enslaved woman, published poems supporting the Patriot cause and advocating for freedom, challenging the belief that women and African Americans were intellectually inferior. Around the same time, Abigail Adams urged her husband to consider women's rights, though the Framers ultimately excluded women from political participation. By the early 1800s, women were deeply involved in the abolitionist movement but faced exclusion and social constraints as they tried to make their voices heard. Over time, many female abolitionists realized that achieving meaningful reform required securing their own political rights as well.

Think Twice

How were the abolition movement and the women's suffrage movement connected?

The women's suffrage movement gradually gained momentum throughout the 1800s. This 1868 cartoon reflects the mixed and often conflicted public reactions to the idea of granting women the right to vote, a debate that would continue for decades. The sign in the cartoon reads "Vote for the Celebrated Man Tamer Susan Sharp-Tongue."

The Seneca Falls Convention of 1848

In 1840, a group of Americans attended the World Anti-Slavery Convention in London, England. However, female delegates were excluded from the meetings and could only observe the proceedings from a balcony. Lucretia Mott and Elizabeth Cady Stanton, two of the women relegated to the balcony, were inspired by this experience to fight for women's rights in the United States, a goal they would fulfill eight years later at Seneca Falls.

In 1848, Mott and Stanton, along with Jane Hunt, Mary Ann M'Clintock, and Martha Wright, organized the Woman's Rights Convention. It is now known as the Seneca Falls Convention, named for its location in Stanton's hometown of Seneca Falls, New York. The event, which you briefly read about in Unit 1, began on July 19. Approximately two hundred women and a small group of men attended the first day. An even larger crowd gathered the next day, including abolitionist Frederick Douglass. Elizabeth Cady Stanton took the stage at the Wesleyan Chapel and began to read aloud: "We hold these truths to be self-evident: that all men and women are created equal."

Stanton's speech, called the Declaration of Sentiments, borrowed language from the Declaration of Independence and included fifteen grievances detailing the unfair and unequal treatment of women by men. Among these grievances were the inability to vote, the requirement to obey laws that they had no part in making, and limited property rights. Stanton punctuated her speech with a demand:

> Now, in view of this entire disfranchisement of one-half the people of this country, their social and religious degradation,—in view of the unjust laws above mentioned, and because women do feel themselves aggrieved, oppressed, and fraudulently deprived of their most sacred rights, we insist that they have immediate admission to all the rights and privileges which belong to them as citizens of these United States.

With these words, Stanton was calling for suffrage for women. Many in the audience were shocked; surely, this demand was taking things too far, too fast. Even Lucretia Mott had initially counseled her friend to omit this from her speech. Despite this, most of the convention attendees supported Stanton's calls for women's right to the vote.

Stanton also noted in the Declaration of Sentiments, "In entering upon the great work before us, we anticipate no small amount of misconception, misrepresentation, and ridicule." She was correct. Few newspapers took the Seneca Falls Convention and the demands of its attendees seriously. Some articles openly mocked the women for demanding voting and property rights. Yet activists in the United States were undeterred. The Seneca Falls Convention and the

Declaration of Sentiments were a catalyst, marking the formal start to the women's rights movement.

Think Twice

Why did Elizabeth Cady Stanton write the Declaration of Sentiments?

Susan B. Anthony

Susan B. Anthony was one of the most prominent and influential members of the nineteenth-century women's movement. Like many other early abolitionists, Anthony came from a Quaker family that was actively involved in the abolitionist movement, including hosting meetings at their home. Anthony's family also placed great emphasis on educating children. She began teaching younger children at home before attending the Friends' Seminary in 1837, where she studied literature, mathematics, and science, among other subjects.

In 1848, Anthony became a teacher in New York and joined the teachers union, where she learned that female teachers earned just 25 percent as much as their male counterparts. That same year, Anthony became active in the temperance movement (described in the sidebar "The Temperance Movement" on page 216). After giving her first public speech, she worked with others to collect signatures on a petition that demanded the New York state legislature pass a law limiting alcohol sales. The legislature rejected the petition because many of the twenty thousand signatures were from women and children. A few years later, she was barred from speaking at a temperance meeting and was told that women in attendance were simply there to "listen and learn." These events made a significant impression on Susan B. Anthony. She realized that if women wanted to make an impact, they would need economic and political equality.

During the 1850s and 1860s, Anthony traveled the country delivering antislavery speeches. While she supported the Union cause, she criticized President Lincoln's initial reluctance to act decisively against slavery. Anthony met fellow reformer Elizabeth Cady Stanton during this time, and the two became fast friends. In 1863, Anthony, Stanton, and another activist named Lucy Stone established the Women's Loyal National League to advance a constitutional amendment that would abolish the institution of slavery. Their campaign helped lay the groundwork for the ratification of the Thirteenth Amendment in 1865.

Anthony's and Stanton's antislavery work coincided with the growing women's rights movement. Together, Anthony and Stanton founded the American Equal Rights Association in 1866. **Suffragists** had only a few legal strategies at their disposal to advance women's rights. These included campaigning at the state and national levels, proposing new legislation, lobbying voters supportive of their cause, and testing

Susan B. Anthony (seated center) poses with other members of the women's suffrage movement in 1896. Anthony chose never to marry, enabling her to travel the country at her discretion, giving speeches, organizing supporters, and campaigning for women's rights.

women's rights in court. In 1872, Anthony and about a dozen other women opted for a more controversial strategy. On November 5, the women registered to vote in New York and cast their ballots in the presidential election; they were arrested less than two weeks later. The women entered a plea of not guilty and were released on bail.

Anthony began giving lectures about her arrest in Ontario County, where her trial was to be held, leading the prosecutor to ask that the trial be held in another county in New York. On June 17, 1873, Anthony faced a jury of twelve men, but the outcome had been predetermined. The judge instructed the all-male jury to convict, denying them the opportunity to deliberate. Anthony was convicted and issued a fine of one hundred dollars, which she refused to pay, stating, "I shall never pay a dollar of your unjust penalty."

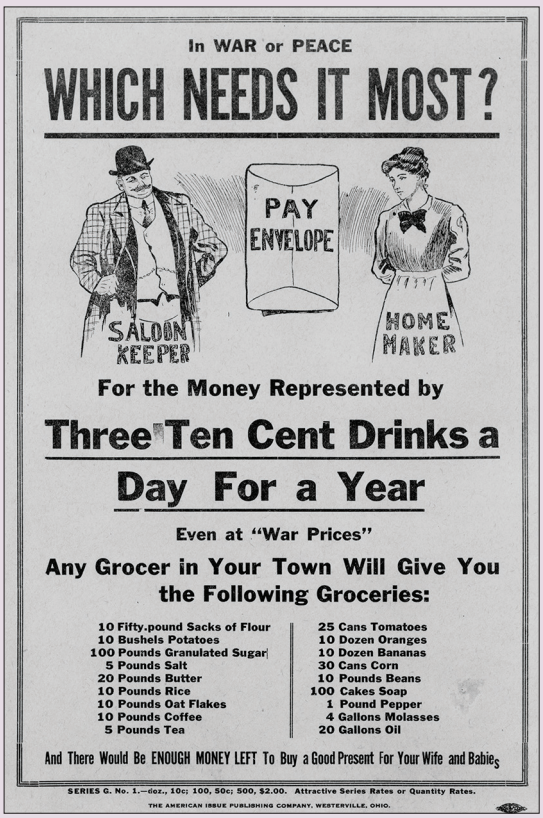
Anthony had hoped the judge would sentence her to jail, but he knew this would allow her to appeal his ruling—potentially to the Supreme Court and certainly to the court of public opinion. As it was, the story of Anthony's trial was carried by newspapers across the country, publicizing the discussion of women's suffrage.

The Temperance Movement

Many reformers of the Progressive Era worked on more than one issue. This is especially true of the temperance movement, which included many suffragists and actually began as far back as the early 1800s. Its goal was to reduce or eliminate the consumption of alcohol in the United States. The movement gained steam through the nineteenth century with the formation of the American Temperance Society, the Woman's Christian Temperance Union, and the Anti-Saloon League. Members of the movement attributed a range of social ills to alcohol consumption, including negative impacts on women and children. As you know, men earned more money than women at this time, and many women did not have opportunities outside of the home. That meant that money spent in a bar or saloon was money that did not go to caring for a family's material needs. Additionally, many factory owners also supported temperance—it was in the owners' best interests to employ workers with clear heads.

As the twentieth century got underway, a number of states passed laws to prevent or limit the sale of alcohol. But members of the temperance movement aimed for more: federal legislation. In 1917, Congress passed a constitutional amendment that prohibited the manufacture, transportation, and sale of alcohol. Three-fourths of the states ratified the act in a little over a year, making it the Eighteenth Amendment to the Constitution.

The Eighteenth Amendment had many effects, both positive and negative. Alcohol consumption declined, as did the number of arrests for drunkenness. However, as you will read in Unit 4, the amendment also fueled the rise of organized crime, as bootleggers and speakeasies emerged to meet the continued demand for alcohol. The Eighteenth Amendment was repealed by the passage of the Twenty-First Amendment in 1933.



Members of the temperance movement believed that alcohol consumption was a major contributor to social problems. During Prohibition, temperance supporters continued to call on Americans to forgo alcohol in the interest of their families.

Susan B. Anthony continued her activism through the late 1800s, helping write the multivolume *History of Woman Suffrage* and remaining active in national suffrage organizations until her death in 1906.

Think Twice

What actions did Susan B. Anthony take to promote women's suffrage, and how did her efforts help advance the movement?

Women's Suffrage Organizations

In Unit 1, you read about how the Fourteenth and Fifteenth Amendments were ratified during Reconstruction. Recall that the Fourteenth Amendment defined citizenship and penalized states that denied voting rights to adult male citizens, and the Fifteenth Amendment prohibited states from denying voting rights on the basis of "race, color, or previous condition of servitude."

The Fourteenth and Fifteenth Amendments divided members of the American Equal Rights Association. Some, including Lucy Stone and Frederick Douglass, argued that it would be difficult to gain suffrage for African American men and white women simultaneously. As such, those members considered the Fifteenth Amendment to still be a step in the right direction. Meanwhile, Susan B. Anthony, Elizabeth Cady Stanton, and others opposed the Fifteenth Amendment because it did not provide for universal suffrage—in other words, voting rights for *all* eligible citizens, regardless of race or gender. This schism among members led Anthony and Stanton to form the National Woman Suffrage Association (NWSA) in 1869, the same year the proposed amendment passed Congress

National Women's Suffrage Organizations

Organization	Date Formed	Goals and Actions
National Woman Suffrage Association (NWSA)	1869	Focused on federal suffrage for women, opposed the Fifteenth Amendment for excluding women, supported equal pay, included only women as members
American Woman Suffrage Association (AWSA)	1869	Focused on gaining women's suffrage at the state level, supported the Fifteenth Amendment, included male members and leaders
National American Woman Suffrage Association (NAWSA)	1890	Merged NWSA and AWSA, combined federal- and state-level strategies to promote women's voting rights

Women's suffrage groups sometimes varied in their focus and strategy in the late nineteenth century.

The National Woman Suffrage Association (NWSA) advocated for women's suffrage, along with other reforms to bring equality to women in the United States.

and was sent to the states for ratification. Meanwhile, a pro–Fifteenth Amendment faction, including Lucy Stone, formed the American Woman Suffrage Association (AWSA) later that year. Eventually, both groups united to become the National American Woman Suffrage Association (NAWSA).

Despite their advocacy for women's rights, these organizations often excluded women of color from full participation. Harriet Tubman, Ida B. Wells, and Mary Church Terrell, along with other female African American activists, established the National Association of Colored Women (NACW) in 1896. In addition to fighting for women's suffrage, the NACW supported equal wages for African Americans and increased access to education and childcare. The organization also worked against segregation and the practice of lynching.

Think Twice

How did the NWSA differ from the AWSA?

Newspapers and magazines often mocked the women's suffrage movement. This 1909 cartoon suggests that granting universal suffrage would disrupt traditional social norms.

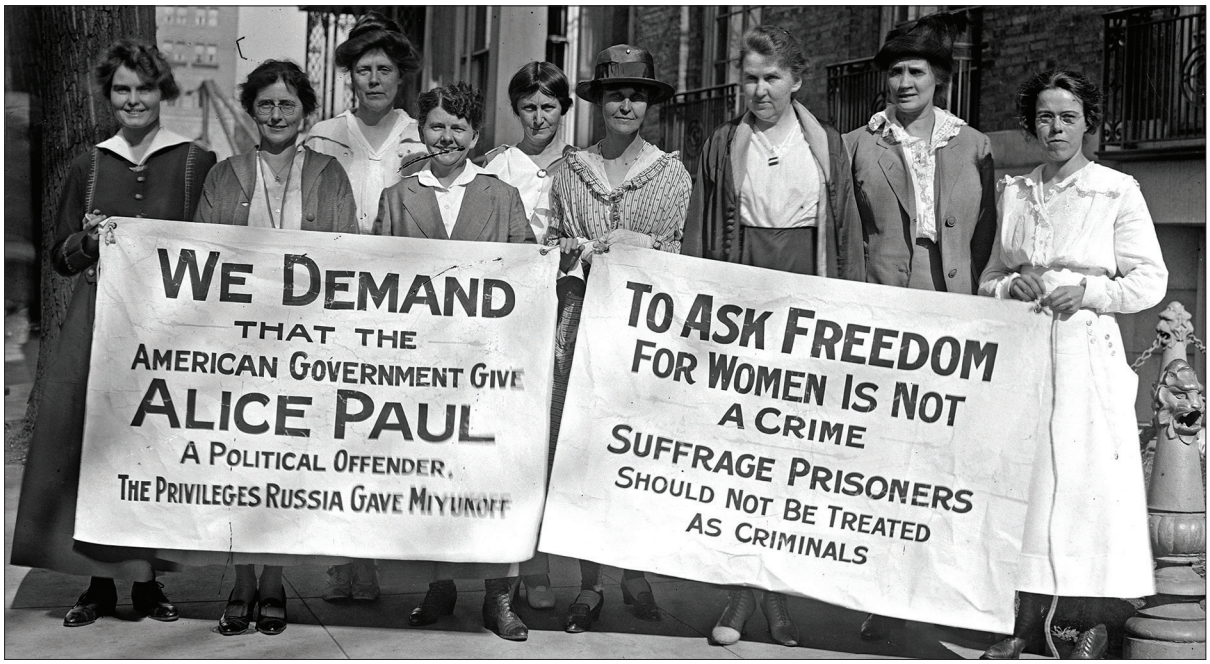
The Anti-Suffrage Movement

In the late 1800s and early 1900s, many Americans, including women, did not support women's suffrage. Prevailing beliefs, especially among white middle- and upper-class Americans, held that women belonged in the home, not in politics. Anti-suffragists presented a range of arguments against enfranchising women. Some claimed that women did not actually want the political responsibility of staying informed and voting. They argued that women already had too much to manage in the home. Others took an economic angle, arguing that enfranchising women would double the number of voters, contributing to increased election costs.

The Movement Progresses

Susan B. Anthony and Elizabeth Cady Stanton helped build the push for women's suffrage into a powerful, nationally organized movement. Yet neither lived to see the success of their efforts. Stanton died in 1902 and Anthony in 1906, both at the age of eighty-six. However, the effort to enfranchise women did not die with them. A new generation of leaders took up the cause and helped carry it across the finish line.

One such leader was Alice Paul, who first became involved with the women's movement as a member of the Women's



Alice Paul was arrested multiple times for her militant tactics. This 1917 photograph shows supporters calling for her to be treated humanely by law enforcement during her imprisonment at Occoquan Workhouse, a prison in Virginia, and in the District Jail in Washington, D.C., following her arrest during a picket line at the White House and subsequent hunger strike. Paul would go on to draft the Equal Rights Amendment in 1923, which was sent to the states for ratification in 1972 but has not yet been ratified.

PRIMARY SOURCE: ANSWERING OBJECTIONS TO WOMEN'S SUFFRAGE, ALICE STONE BLACKWELL, 1916

Alice Stone Blackwell was a feminist activist and writer. In a volume published by the National American Woman Suffrage Association in 1916—a revision of a pamphlet she had first published about a decade earlier—Blackwell responded to popular arguments against women's suffrage.

The reasons why women should vote are the same as the reasons why men should vote—the same as the reasons for having a republic rather than a monarchy. It is fair and right that the people who must obey the laws should have a voice in choosing the law-makers, and that those who must pay the taxes should have a voice as to the amount of the tax, and the way in which the money shall be spent. . . .

In thus taking a vote to get at the wish of the majority, certain classes of persons are passed over, whose opinions for one reason or another are thought not to be worth counting. . . . Is there any . . . good reason why no account should be taken of the opinions of women? Let us consider the reasons commonly given, and see if they are sound. . . .

Women are too emotional and sentimental to be trusted with the ballot.

Mrs. E. T. Brown, at a meeting of the Georgia State Federation of Women's Clubs, read a paper, in which she said: . . .

"Now it is very true of women that they are largely controlled by sentiment [emotion], and, as a matter of fact, men are largely controlled by sentiment also. . . . Was it logic that swept like a wave over this country and sent our army to protect the Cubans when their suffering grew too intense to be endured even in the hearing? . . . Do not men like Washington [and] Lincoln . . . live in the hearts of American men, not alone for what they did, but still more for what they dreamed of? The man who is not controlled by sentiment betrays his friend, sells his vote, is a traitor to his country, or wrecks himself, body and soul, with immoralities; for nothing but sentiment prevents any of these things." . . .

Suffragists and Feminists are the enemies of marriage and the home.

The National American Woman Suffrage Association at its annual convention in Washington in December, 1915, passed the following resolution by a unanimous vote:

"That we believe the home is the foundation of the State; we believe in the sanctity of the marriage relation; and, furthermore, we believe that woman's ballot will strengthen the power of the home, and sustain the dignity and sacredness of marriage."

Source: Blackwell, Alice Stone. *Objections Answered*. Rev. ed. New York: National Woman Suffrage Publishing, 1916, pp. 1–2, 25–27, 45.

Social and Political Union in England, which fought for women's voting rights in Great Britain. After Paul returned to the United States, she dedicated herself to the cause of American women's suffrage. Paul worked closely with fellow activist Lucy Burns; the two had become friends in a London police station after they had both been arrested at a protest outside of British Parliament.

Paul and Burns were members of the NAWSA. However, they disagreed with the organization's measured tactics. In 1913, they cofounded the Congressional Union for Woman Suffrage followed by the National Woman's Party (NWP) in 1917. The NWP favored aggressive tactics to achieve its goals, and Paul had a particular flair for organizing large events that captured the nation's attention. The NWP organized protests and picketed in front of the White House. The police repeatedly arrested NWP members and beat, chained, and abused them while they were in jail. Paul and other suffragists also went on hunger strikes while imprisoned, resulting in violent force-feedings by law enforcement. Despite these challenges, the suffragists would not be deterred.

Carrie Chapman Catt, Susan B. Anthony's successor as president of the NAWSA, was also a key figure in this phase of the women's movement. Catt was an effective organizer, and her strategies ultimately convinced President Woodrow Wilson of the immediate need for women's suffrage. As you will read, such public support at the national level soon led to the ratification of the Nineteenth Amendment in 1920.

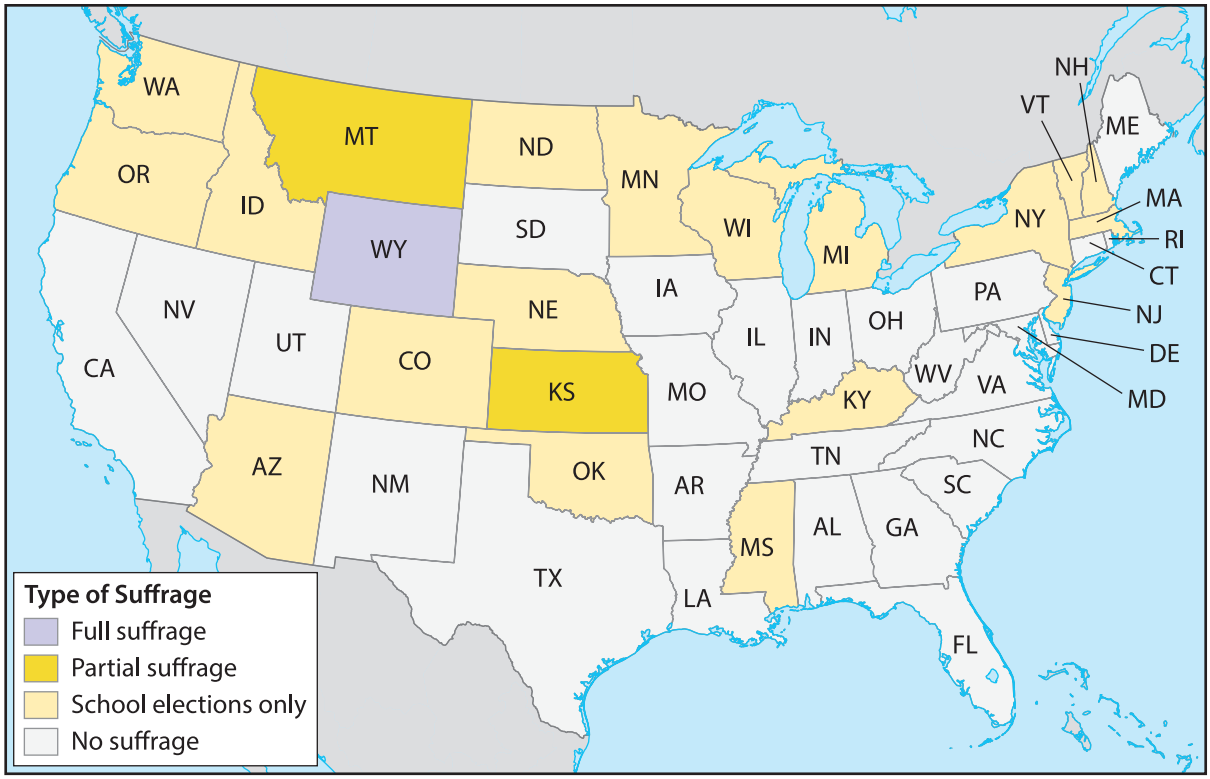
Think Twice

What obstacles did women face on their paths to suffrage and equality under the law?

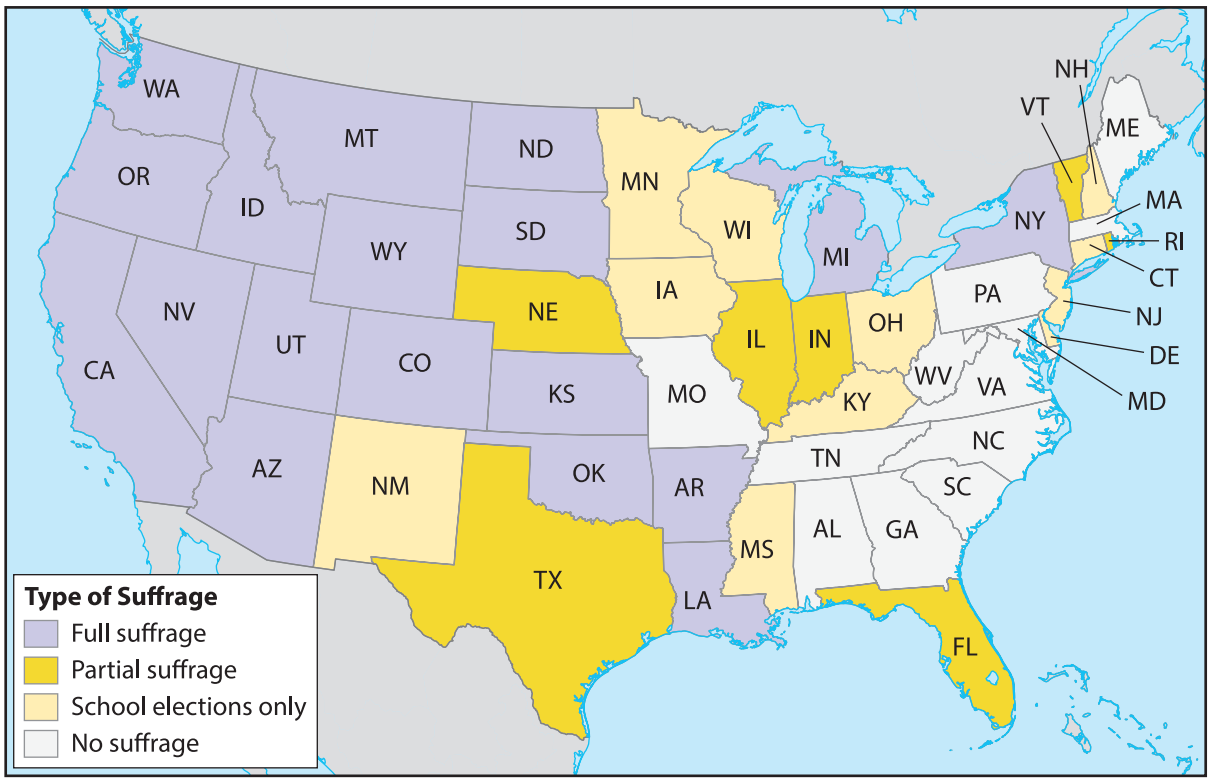
Toward the Nineteenth Amendment

As you learned earlier, some nineteenth-century suffragists advocated for the right to vote at the state level, considering that a major step in the journey to the national franchise. Starting in the late 1800s, the women's suffrage movement gained momentum in Western territories and states, where women were often doing the same work as men. Additionally for some legislators in parts of the West, the franchise was considered a way to attract more white female settlers and guard against African American political empowerment. In Utah, this second concern, as well as a desire to strengthen voter support for Mormon practices, led to more open-mindedness about women's suffrage. Wyoming became the first territory to extend voting rights to women in 1869, followed by Utah (1870), Washington (1883), Montana (1887), and Alaska (1913). When Wyoming achieved statehood in 1890, it became the first state to grant full voting rights

Women's Voting Rights by State, 1890



Women's Voting Rights by State, 1918



The women's suffrage movement secured victories in the states before the ratification of the Nineteenth Amendment in 1919. Full suffrage came earlier to the western half of the country than to the East.

to women. Although some early suffrage laws, including those in Washington, were later repealed, the trend toward state-level victories continued.

Between 1893 and 1918, fourteen other states—mostly in the West—granted women full suffrage. During the same period, twelve additional states permitted women to vote in presidential elections between 1913 and 1919. This meant that more than half of the states had women's suffrage in one form or another. The women's movement also saw a major victory in 1916 with the election of Jeannette Rankin as a U.S. representative from Montana, making her the first woman elected to Congress.

In December 1868, Kansas senator S. C. Pomeroy introduced the first women's suffrage amendment to Congress, but it was voted down. Nine years and one month later, California senator A. A. Sargent introduced his own women's suffrage amendment. Although it failed to pass, Sargent's 1878 proposal used language that would later appear in the Nineteenth Amendment, which Congress passed in 1919. From there, the amendment was sent to the states for their approval. On August 18, 1920, Tennessee became the thirty-sixth state to ratify the Nineteenth Amendment.

The Nineteenth Amendment states, "The right of citizens of the United States to vote shall not be denied or abridged by the United States or by any State on account of sex." Today, many Americans describe the Nineteenth Amendment as the measure that granted women the right to vote. In reality, it prevents the states from passing laws or taking actions that interfere with the right of an eligible citizen to vote based on their sex. While the Nineteenth Amendment enfranchised millions of American women, it is important to note that many African American women still faced racial barriers to voting and could not fully exercise this hard-won right.

Think Twice

How did the women's suffrage movement lead to the passage of the Nineteenth Amendment?

Politicians and the Progressive Era

Throughout this topic, you have read about the many citizen-led reform organizations that formed, grew, and made change happen during the Progressive Era. Much of this change eventually took shape via legislation at the federal and state levels. While muckrakers, social and civil rights reformers, and everyday citizens raised public awareness about changes that were needed, politicians—especially presidents—also played a key role in bringing about change during the late 1800s and early 1900s.

Comparing Political Parties

Democrats/Populists	Republicans
• Opposed tariffs on grounds that they did not help farmers or consumers	• Favored tariffs to protect industry from foreign competition
• Called for stricter government regulation of big business	• Favored a typically laissez-faire approach to big business
• Advocated for bimetallism (gold and silver) to increase the money supply	• Supported the gold standard to maintain economic stability
• Received support from farmers and miners, primarily in the South and West	• Received support from industrialists, wealthy farmers, and skilled factory workers, primarily in the North

In the late 1800s and early 1900s, Democrats absorbed some of the Populist platform, including economic ideas that contrasted strongly with those of Republicans.

Theodore Roosevelt

Theodore "Teddy" Roosevelt (1858–1919) was born and raised in New York. As a child, Roosevelt was often ill, yet he refused to let frailty impede him. He worked for years to build his physical strength, often by spending considerable amounts of time outdoors. Roosevelt graduated from Harvard in 1880 and was elected to the New York state legislature in 1881. Tragedy struck three years later when his mother, Mittie, and his wife, Alice, died just hours apart on February 14, 1884. Grief-stricken, Roosevelt sought comfort in nature and moved to the Dakota Territory to become a rancher. Blizzards in the winter of 1885 wiped out his cattle; he sold his ranch and moved back to New York, where he reentered politics.

Political bosses in the Republican Party chose Roosevelt to run for governor of New York, and he was elected in 1898. Much to the bosses' chagrin, Roosevelt was enthusiastic about government reform. Recall that by this time, the Democratic Party had adopted many of the Populist Party's reform ideas, including calls for greater economic regulation and political accountability. Furthermore, the party bosses were accustomed to controlling candidates and elected members of their party. Roosevelt signed new laws that regulated corporations in the state and removed corrupt officials from office. Within two years, Republican bosses had had enough. They recruited Roosevelt to run as William McKinley's vice presidential candidate in 1900 in the hopes of getting him out of the governor's mansion.

As you learned earlier in this topic, McKinley defeated Democratic and populist candidate William Jennings Bryan in the presidential

While Theodore Roosevelt "trust-busted" those trusts that harmed the public, he supported others and often acted as a mediator between business and labor.

election of 1896. McKinley recommitted the country to the gold standard, and the high tariffs of the early 1890s—the ones that contributed to the panic of 1893—bore his name. Although McKinley served during the Progressive Era, he did not embrace the progressive agenda. He did little to address some of the country's most pressing problems, including the disenfranchisement of women and African Americans and the continued formation of monopolies in violation of the Sherman Antitrust Act of 1890.

Given McKinley's reputation, it may seem odd that Republican bosses would tap a reformer like Theodore Roosevelt to join the president's reelection ticket in 1900. At the time, the vice presidency was a largely ceremonial role that held very little power; Republican leaders in New York thought this was the perfect way to keep popular, reform-minded Roosevelt out of state politics—and out of trouble. Their plan, however, backfired. In 1901, President McKinley was assassinated, making the energetic forty-two-year-old Theodore Roosevelt the youngest president in U.S. history.

Roosevelt was a Republican, but he was also a progressive. As you have read in this and earlier topics, many corporations believed that injury to the public's well-being was just one of many costs of doing business. Roosevelt disagreed with this view. In his eyes, Americans deserved a level playing field—or, in his words, a "square deal." To this end, Roosevelt focused on three areas of reform: corporate regulation, consumer protection, and conservation.

In a departure from laissez-faire presidents of the past, Roosevelt pushed for increased federal regulation of various industries, including mining, oil, and railroads. Railroads often set discriminatory shipping rates that favored large businesses over small ones. This was because large—and very wealthy—corporations could demand rebates, or refunds, on their shipping rates. If they did not receive them, they could simply threaten to take their business to another railroad. The Elkins Act of 1903 ended the practice of rebates and empowered federal courts to end rate discrimination. Three years later, Congress passed the Hepburn Rate Bill, which expanded the Interstate Commerce

"Fighting Bob"

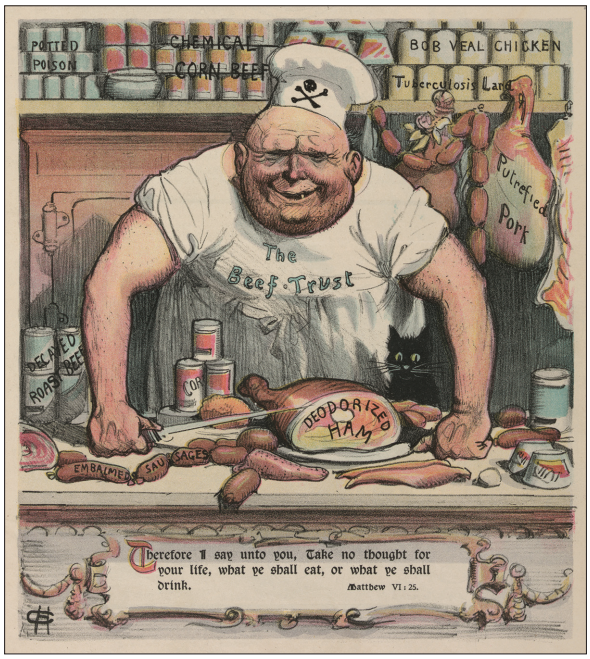
Presidents were not the only elected leaders who fought for and effected change during the Progressive Era. Robert M. La Follette (1855–1925), known by contemporaries as "Fighting Bob," was one of the most prominent progressive leaders of the age. La Follette got his start in Wisconsin politics, rising to the rank of governor before serving as a U.S. senator. At home, La Follette challenged the power of the railroads and Wisconsin's party bosses, and he advocated for increased democracy through the **initiative**, the **recall**, and the **referendum**. Though Wisconsin's legislature ultimately did not adopt the initiative or referendum, it did institute the direct primary. Wisconsin voters, not party leaders, chose their candidates for office. As a U.S. senator, La Follette championed a range of issues, including the direct election of U.S. senators, women's suffrage, and labor reform.

Commission's powers to regulate interstate railroad shipping rates. Along with increased regulations, Roosevelt was a determined "trustbuster." Under the Sherman Antitrust Act, his administration brought more than forty lawsuits against corporations and trusts that he considered to be acting against the public interest. These included a successful case against a railroad trust owned by industrialist J. P. Morgan.

Earlier in the topic, you read about muckraker Upton Sinclair and his influential book *The Jungle*. Roosevelt, like other Americans, was horrified by Sinclair's revelations about the meatpacking industry. But Roosevelt did not need to rely solely on progressive literature to understand just how unsafe and unappetizing processed foods in the United States could be. During the Spanish-American War, Roosevelt and his unit, the First U.S. Volunteer Cavalry—nicknamed the Rough Riders—had been given rations of canned meat, which Roosevelt would later characterize as "embalmed beef."

Roosevelt pressured Congress to take action to protect consumers from unsafe food processing practices, resulting in the passage of two landmark pieces of legislation in 1906: the Pure Food and Drug Act and the Meat Inspection Act. The Pure Food and Drug Act required companies to include an accurate list of ingredients on packaged foods. It also banned the sale of impure foods and drugs. Products with intentionally misleading labels or branding were likewise prohibited. The Meat Inspection Act established new processing and inspection standards to prevent the sale of contaminated meat. Additionally, it set new standards for how livestock was slaughtered and processed and required the U.S. Department of Agriculture (USDA) to inspect meatpacking plants.

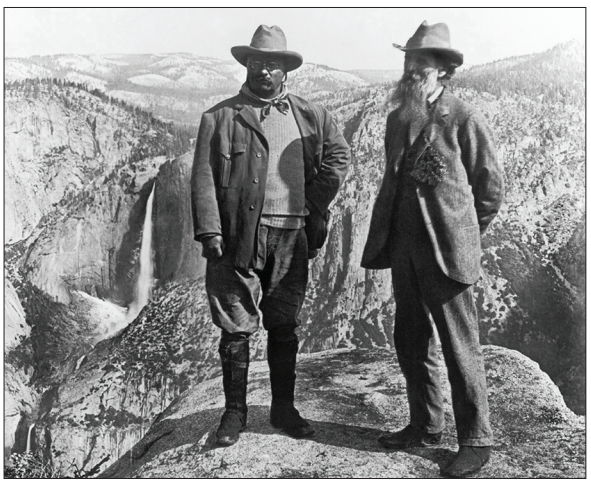
Roosevelt also focused his reform efforts on the environment. In Topic 2, you read about the effects of rapid industrialization on the



Following Upton Sinclair's revelations about the meatpacking industry, magazines such as *Puck* printed articles and cartoons that piqued the public's ire and spurred Congress to intervene.

United States. The factories and industries that had cropped up throughout the country were massive consumers of natural resources, including fossil fuels, minerals, and timber. Industrialists indiscriminately sank new mines, clear-cut forests, and polluted the air and waterways to keep up with demand. These actions endangered the well-being of people and wildlife alike.

Roosevelt's passion for the great outdoors had never waned, and he was horrified by the effects that rapid industrialization and urbanization had on U.S. lands. Roosevelt knew that the country's natural resources were finite and feared that without a concerted conservation effort, they could disappear entirely. At the same time, he also recognized the significance of preserving outdoor spaces for future generations of Americans to enjoy. Roosevelt was inspired by the writings of John Muir, a widely read naturalist and advocate for nature. Muir had published a series of articles arguing in favor of preserving California's forests. In the 1880s, he turned his attention to the harms caused by livestock to a recreation area overseen by the state of California that included part of the Yosemite Valley and Mariposa Grove, a grove of giant sequoia trees. Muir's writings and efforts ultimately led to the creation of Yosemite National Park in 1890, bringing a large portion of the Yosemite Valley under federal protection. In 1903, after camping with Muir in the park, President Theodore Roosevelt agreed to place the state-controlled Yosemite Grant under federal control as well. These early actions helped lay the groundwork for the system of national parks and monuments we have today.



In 1903, President Theodore Roosevelt (left) camped in the Yosemite Valley with John Muir (right). The fateful trip inspired additional conservation and preservation efforts by the federal government.

The Antiquities Act of 1906 became the cornerstone of Roosevelt's conservation and preservation agenda. Through the act, the federal government had the power to designate and protect areas that it deemed archaeologically or culturally important. Roosevelt went on to create eighteen national monuments under the Antiquities Act. He also established five national parks, dozens of wildlife sanctuaries, and more than two hundred million acres (809,371 sq km) of national forest in the United States, earning him the title of the "conservation president."

Think Twice

How did Theodore Roosevelt advance progressive reforms during his presidency?

William Howard Taft

Theodore Roosevelt was instrumental in defining the role of a progressive president and laid the groundwork for additional reforms under two of his successors: William Howard Taft and Woodrow Wilson.

William Howard Taft was born in Ohio to a political family. His father, Alphonso, had served as secretary of war and attorney general under President Ulysses S. Grant.

Taft joined President William McKinley's administration in 1900 and went on to serve as Theodore Roosevelt's secretary of war in 1904. Roosevelt and Taft became close friends, and when Roosevelt decided not to run for reelection in 1908, he endorsed Taft for the Republican Party's nomination. Building on the progressive energy sparked by Theodore Roosevelt's presidency, Taft captured the Republican nomination and won the 1908 election against Democrat William Jennings Bryan. Roosevelt's support and widespread interest in reform helped secure Taft's victory. His win continued the Republican Party's winning streak for a fourth straight election.

Theodore Roosevelt was still immensely popular at the time of Taft's election, and many now-progressive Republicans assumed that Taft would pick up where his predecessor had left off. But those who expected Taft's presidency to be a continuation of

William Howard Taft is the only person in U.S. history to serve as both president and chief justice of the Supreme Court.

Roosevelt's were sorely disappointed. Taft was very different from Roosevelt. He was more cautious. He rarely pressured Congress to pass legislation and did not appoint any progressives to his presidential cabinet. Taft also aggravated progressive Republicans over the issue of tariff reform. In 1909, he called a special session of Congress to reduce the rates of existing tariffs—a move supported by progressives. But the effort backfired when Taft, influenced by more conservative Republicans, signed a tariff act that *raised* average tariff rates, frustrating progressives.

Despite these disappointments, Taft was a progressive president. Between 1909 and 1913, his administration filed nearly twice as many antitrust lawsuits against companies as Roosevelt's. Earlier, you read about Ida Tarbell's exposé of J. D. Rockefeller and the Standard Oil Company. Taft ultimately oversaw the dissolution of that trust in 1911. Also, Taft, like Roosevelt, was a conservationist. He established the Bureau of Mines under the Department of the Interior to conserve the country's mineral deposits and improve mining safety, and he also prevented millions of acres of federal lands from being sold.

In 1910, Taft signed the Mann–Elkins Act into law. This law increased the regulatory power of the Interstate Commerce Commission (ICC) by bringing cable, telegraph, and telephone companies under its jurisdiction. It also allowed the ICC to change railroad rates that were deemed unfair.

In the very last hours of Taft's presidency, he signed a law that established the Department of Labor, marking a major victory for American workers. The department's stated goal is "to foster, promote and develop the welfare of working people, to improve their working conditions, and to enhance their opportunities for profitable employment." The law brought four existing bureaus under the Department of Labor's control, including the Bureau of Labor Statistics, and created the U.S. Conciliation Service to mediate disputes between labor and management.

Congress also passed two amendments long championed by populists and later progressive reformers during Taft's presidency. The Sixteenth Amendment, passed by Congress in 1909 and ratified in February 1913, established a graduated federal income tax that taxed people with higher incomes at a higher rate than those with lower incomes. The Seventeenth Amendment provided for the direct election of senators. Previously, state legislatures chose U.S. senators, a process that had often included the interference of party bosses. The Seventeenth Amendment was passed by Congress in 1912, while Taft was still in office, and ratified at the start of Woodrow Wilson's presidency, in April 1913.

Believing that Taft should have done more to advance progressive policies, Roosevelt eventually became disillusioned with his leadership and withdrew his support for his successor when it came time for a possible

second term. Roosevelt went so far as to challenge Taft for the Republican Party's nomination in 1912. While Taft managed to maintain his party's support, Roosevelt was undeterred. He formed the Progressive Party, nicknamed the "Bull Moose Party" in reference to a statement Roosevelt made about being "as strong as a bull moose." Roosevelt and Taft split the progressive vote, and both ultimately lost to Woodrow Wilson, the Democratic Party candidate.

Think Twice

How did President Taft contribute to Progressive Era reforms?

Woodrow Wilson

The twenty-eighth U.S. president, Woodrow Wilson, was born in Virginia. His father, a Presbyterian minister, served as a chaplain for the Confederate Army during the Civil War. Wilson graduated from Princeton University in 1879 and briefly studied law at the University of Virginia before enrolling at Johns Hopkins University, where he earned a PhD in history and government. He went on to become an esteemed college professor, and in 1902, he became president of Princeton.

Wilson's work in academia, especially his attempts to reform education at Princeton,

ELECTED BY A PLURALITY of 4875 COLUMNS

The Philadelphia Inquirer

5 A. M. EDITION

VOL. 167. NO. 129 — WEATHER—Increasing Cloudiness — PHILADELPHIA, WEDNESDAY MORNING, NOVEMBER 6, 1912 — ONE CENT

LANDSLIDE FOR WILSON AND MARSHALL

TAFT CARRIES PHILADELPHIA BY 10,000 PLURALITY

Roosevelt Runs Ahead of Governor Wilson in Local Race

Mackey and Drake Defeated for Congress by Logue, Donohoe Beats Borneman

ROOSEVELT WINS IN PENNSYLVANIA IN CLOSE CONTEST

Taft, Ahead at First, Drops to the Third Place

Democrats Make Great Gains, Republican State Ticket Is Elected

WILSON IS ELECTED PRESIDENT BY A GREAT MAJORITY

Roosevelt Does Not Manifest Expected Strength in the East and His Leaders Concede His Defeat in Nation---Illinois Their One Bright Spot

Democratic Governors in Massachusetts, Illinois, Indiana and Ohio---Republicans Lose Congressmen in the East, According to Early Returns---Heavy Vote Polled

WOODROW WILSON has been elected President of the United States.

By the greatest landslide that ever swept a Democrat into the White House, the present Governor of New Jersey, who until three years ago, had spent his time in the tranquil shades of Princeton College, has defeated President Taft, Republican candidate, and Col. Theodore Roosevelt, Progressive candidate.

Colonel Roosevelt, with the twenty-nine electoral votes of Illinois, and probably the thirty-eight votes of Pennsylvania, will be second to Wilson in the electoral college, with President Taft running third, but the popular vote will be in doubt as between Taft and Roosevelt for several days.

Governor Marshall, of Indiana, has been elected Vice President, defeating Governor Johnson, of California, the Progressive candidate, and the unnamed candidate of the Republican Party.

DIXON CONCEDES ELECTION

Senator Dixon, chairman of the Progressive Party's national committee, conceded that the East had gone for Wilson and that the electoral votes of such States New York, Massachusetts, Maine, New Hampshire and others, combined with the so South, in which there were no breaks, made certain that Wilson's majority in the elector college would be overwhelming.

Both the Republican and Progressive Party leaders concede the election of Wilso

Woodrow Wilson won 435 electoral votes in the 1912 presidential election, compared to the 88 captured by Theodore Roosevelt and the mere 8 won by William Howard Taft.

made him popular in the press and captured the attention of Democratic Party leaders in New Jersey. This led to his nomination and subsequent election as governor of New Jersey in 1910. As governor, Wilson tackled corruption in political elections, held daily press conferences, and helped institute the direct party primary, in which voters, not party leaders, would choose their candidates for office. The reforms that Wilson undertook as governor made him a national figure, and two years later, he was the Democratic Party's candidate for president. As you just read, in 1912, there was a three-way race for president between Democrat Woodrow Wilson; the incumbent Republican candidate, William Howard Taft; and former president and Progressive Party candidate Theodore Roosevelt. Wilson secured less than half of the popular vote but won the electoral vote in a landslide.

Once in office, Wilson began to implement his New Freedom program, which focused on tariff, monetary, and antitrust reforms to help reduce inequality and promote economic opportunity for all Americans. Congress passed the Underwood Tariff Act of 1913, which brought tariffs down from 40 percent to 25 percent. That same year, Congress passed the Federal Reserve Act, which established the Federal Reserve System that helps keep the country's economy stable, oversees other financial institutions, and sets the country's monetary policy.

Wilson then set his sights on antitrust reform, starting with the Clayton Antitrust Act in 1914. This legislation strengthened the Sherman Antitrust Act by defining and clarifying important terms, adding new regulations to end anticompetitive business practices, and closing loopholes in the earlier law. The act was popular with farmers and labor alike. In addition to legalizing the formation of labor unions, boycotts, and strikes under federal law, the act also prevented labor and farm organizations from being prosecuted for antitrust activities. Wilson took the antitrust regulation a step further later in 1914 when he signed the Federal Trade Commission Act into law. The act established the Federal Trade Commission and gave it broad powers to curb the development of monopolies in the United States.

While Wilson's economic reforms were impactful, Americans were still eager for *social* change. As his reelection campaign loomed in 1916, Wilson knew he would need to expand his progressive agenda to attract former members of the now-defunct Progressive Party. To that end, he worked with Congress to pass legislation that included meaningful benefits for labor, starting with the Keating–Owen Child Labor Act. This law functionally banned child labor in the United States. Wilson was reelected to the presidency that November.

In addition, in the spring of 1916, railroad unions had sent a resolution to railroad owners demanding an eight-hour workday

and overtime pay. The railroad owners had rejected the demand, raising the threat of a national railroad strike. At this time, World War I was raging in Europe, and Wilson worried that a strike would impact the country's ability to prepare for potential involvement in the conflict overseas. Wilson encouraged Congress to pass the Adamson Act, which established an eight-hour workday for railroad workers on interstate lines. This legislation eventually led to a shorter workday for workers in other industries as well. Wilson promoted workers' compensation, or financial and health benefits, for federal employees who were injured or killed on the job. He also increased access to long-term loans for farmers through the Federal Farm Loan Act.

While Woodrow Wilson certainly achieved a great deal of reform during his two terms in office, he did not accomplish as much in some areas. Earlier in the topic, you read about the Nineteenth Amendment. This amendment was ratified in 1920, during his second term. Wilson largely avoided the issue of women's suffrage for most of his presidency, citing the belief that it was an issue for the states, not the federal government, to decide. Mounting pressure from the women's suffrage movement—which included his three daughters—and women's contributions during World War I eventually changed his mind. At the same time, Wilson failed to advance racial equality in the United States, and he allowed segregation to continue in many parts of the federal government.

Think Twice

How did Woodrow Wilson's domestic policies address the goals of progressive reformers?

The Progressive Legacy

The Progressive Era was a time of immense change for the United States. Reformers and elected leaders from all walks of life were able to accomplish a great deal and improve the lives of people living in the United States by collaborating on a range of issues. Muckrakers such as Upton Sinclair and Jacob Riis inspired the passage of new legislation to improve society, while other investigators like Ida Tarbell helped expose corrupt and harmful business practices. At the same time, social and political reformers worked within neighborhoods and cities and at all levels of government to transform the country. The progressives serve as an incredible reminder that people working together can achieve so much more than any single individual can. As you will read in later units, the progressive legacy lived on in American history by inspiring later generations of activists and reformers. It set the stage for the evolution of a more egalitarian society in a country that was about to become a much more prominent player on the world stage.

Unit 3: Expansion and Conflict

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Topic 1
The Age of Imperialism

Framing Question

What events and policies led to the United States becoming a world power?

Here, the SS *Ancon* passes through the Panama Canal's Gatún locks, structures built to raise boats from sea level to the level of Gatún Lake. The lake was an engineering achievement created by human laborers.

An Engineering Triumph

Setting the Scene

On the morning of August 15, 1914, the American steamship SS Ancon *leaves Gatún, a town on the Atlantic side of the Central American country of Panama. The president of Panama is on board, along with two hundred guests and dignitaries, including the American* ***ambassador****. The SS* Ancon *is about to be the first ship to make a journey to the Pacific Ocean using a new, human-made route, the Panama Canal, as part of the canal's grand opening. Built by the United States between 1904 and 1914, the canal is an engineered waterway that cuts through the isthmus, or narrow strip of land, connecting North America and South America. Previously, to cross from the Atlantic Ocean to the Pacific Ocean—or to travel between the East Coast and the West Coast of the United States—boats were required to take the long, dangerous journey around the southern tip of South America. The new Panama Canal will allow a much shorter trip from ocean to ocean. Instead of spending weeks sailing around South America, ships will now be able to cross from one ocean to the other through the Panama Canal in just nine to ten hours. This is a shorter time than ever before, cutting about eight thousand nautical miles (14,800 km) off the route. The* Ancon*'s trip from the Atlantic to the Pacific symbolizes that the canal is officially open.*

The achievement took a decade for the United States to complete. But the United States, along with Britain and France, had considered building a canal to connect the two oceans years earlier. A French company even began construction in Panama in 1881 but failed due to engineering challenges and a high death toll from disease. President Theodore Roosevelt visited the canal when it was under construction, becoming the first sitting president to travel outside the United States.

The canal required the labor of more than forty thousand people and cost the United States around $375 million. It was a massive undertaking. Prior to its completion, the project was daunting enough to seem virtually impossible. Workers had to create the world's largest human-made lake, cut through the natural boundary separating the river systems of two continents, and build massive locks to lift and lower boats safely. The Panama Canal is, and will remain, one of the world's greatest engineering accomplishments.

The opening of the canal in August 1914 symbolizes the United States' emergence as a world power. It shows that the country has the financial and technological strength to complete such a project. It also marks the United States' growing role in foreign affairs. This unprecedented traffic route will allow the United States to expand its own overseas trade and boost global commerce.

The Panama Canal is also a symbol of growing American power and ambition. To build the canal, the United States helped Panama gain independence from Colombia. In return, the new Panamanian government granted the United States the land and rights to the canal. The project is one example of the growing ***imperialism*** *of the United States, a product of its willingness to exert power and influence in Latin America.*

The United States Expands Its Global Influence

During the early nineteenth century, the United States was gradually industrializing. A growing network of railroads made it easier to transport goods across regions, boosting domestic trade and increasing wealth for American merchants. However, many merchants saw even greater profits in international trade, as demand for U.S. goods rose overseas. To understand why the United States expanded its reach abroad, it is helpful to understand the multiple motivations behind this growth. These included economic interests, military strategy, ideological beliefs, and competition with Europe.

One major motivation was access to new markets and raw materials. To grow the U.S. economy, American industry needed to make machines and goods that were desirable abroad. Selling goods overseas meant higher profits, while importing raw materials like rubber, sugar, coffee, and minerals supported further industrial growth. Government officials and business leaders saw Latin America as a crucial part of American economic growth because the region offered valuable raw materials. As a result, American economic interests became closely tied to U.S. foreign policy in Latin America. At the same time, European economies were also industrializing, and the United States knew that it would have to compete with them in the global marketplace. Leaders feared that if the United States did not expand its influence, European powers like Britain, France, and Germany would dominate key trade regions. Supporters of American imperialism believed that the importance of access to raw materials and new markets made it an economic necessity. They felt the United States should take advantage of its global trading opportunities, such as those in Asia, which you will soon read about.

Military strategy also played a role in expansion. Policymakers and naval leaders believed that the United States needed overseas ports and coaling stations to support its growing navy and protect trade routes. Latin American and Caribbean locations were seen as especially important.

Ideology influenced expansion as well. Some Americans believed that manifest destiny meant expanding not just across North America but also into new global frontiers. Others argued that the United States had a duty to spread what they saw as superior American values, institutions, and culture. Thus, democracy, Christianity, and industrial progress were all seen as uniquely American exports. Similarly, proponents of expansion believed Americans could maintain law, order, and stability in ways other countries could not. This belief was often based on racial and cultural assumptions that non-

Western peoples were incapable of self-rule. These beliefs and arguments helped justify intervention and expansion.

Expansion into Asia

As the United States expanded its role in global affairs, its leaders sought to establish a presence across the Pacific. American businesses and consumers were eager to access goods from East Asia that consumers in the United States considered luxurious, such as silk, tea, ceramics, and spices. The potential for access to Chinese goods made that country a target for American economic interests. U.S. merchants believed that they should have the same opportunities to operate in China that the British had negotiated for themselves. In 1844, the United States established an official trade relationship with the Chinese government through the Treaty of Wangxia. The terms of the treaty gave American merchants the right to trade at five different Chinese ports.

Ships traveling to China required ports to stop at across the Pacific. At the time, many ships were powered by steam engines, which burned coal as fuel. The United States needed coaling stations, usually ports or designated stops, where ships could refuel by loading coal. Japan, an island country along Asia's eastern coast, was seen as an ideal place for these stations. It was also seen as another valuable potential trading partner. But Japan was one of the most difficult countries for a foreign government to establish relations with at the time.

For more than two centuries, Japan had largely limited foreign contact and trade. Commodore Matthew Perry's treaty marked a major shift by opening U.S. commerce with Japan, a nation that had historically maintained strict trade restrictions.

As with China, Americans wanted access to Japan's goods. U.S. commodore Matthew Perry, with the support of the U.S. government, sailed to Japan with a fleet of ships in 1853 to negotiate with Japanese leaders. Perry arrived with four U.S. warships, armed with advanced weapons. Japan lacked a defensive force strong enough to compete militarily with the United States, putting it at a disadvantage in the negotiations. A treaty, signed in March 1854 after initial reluctance from Japan's leaders, granted the United States access to two Japanese ports for trade and resupply. It also set favorable terms for

American goods entering Japan, such as low taxes. Perry had reopened trade between the previously isolated Japan and the Western world for the first time in two hundred years—a sign of the United States' growing global reach. In the coming years, other Western countries would follow the United States into Japan.

Think Twice

What did the United States hope to gain from opening trade with China and Japan?

At first, many Americans were unenthusiastic about the 1867 purchase of Alaska. Often called "Russian America," the region was initially considered distant and useless. Its value became clearer years later with the discovery of gold.

The Purchase of Alaska

In the middle of the nineteenth century, besides expanding its international trade, the United States also expanded its land holdings and borders. In 1867, U.S. leaders purchased the land that is now Alaska from Russia for $7.2 million. Russian leaders were eager to sell the land. Between 1853 and 1856, Russia had fought—and lost—a war in the Crimean Peninsula against the Ottoman Empire, France, and Great Britain. After their defeat, Russia's leaders found they could no longer afford to maintain much of their overseas empire.

Russia found an eager buyer in the United States. American leaders wanted to control more of the North American continent, and they also recognized that Alaska's vast Pacific coastline and proximity to Asia could extend American influence across the region. Secretary of State William Seward, who managed the purchase, had desired Alaska for some time. Seward was a strong supporter of U.S. expansion. The principle of manifest destiny influenced the purchase of Alaska, which showed that the United States could continue to grow geographically.

When news of the purchase reached the American public, they were skeptical. The value of the faraway land, in a cold climate thousands of miles away, was not immediately obvious to the public. Some newspapers described Alaska as "Seward's Folly" or "Seward's Icebox." However, Seward and supporters of the purchase recognized the military advantages of Alaska as well as the trade benefits of its resources, like fisheries

and animal fur. Public opinion about Alaska would change several decades later, in the 1890s, when prospectors discovered gold there. This discovery inspired many Americans to move to Alaska and search for riches in the "Alaska gold rush."

At 586,412 square miles (1,518,800 sq km), Alaska nearly doubled the amount of land under American control upon its acquisition. Although the territory would not become a state until 1959, the purchase marked the first major U.S. expansion beyond its contiguous land borders.

Think Twice

Why did the United States want to purchase Alaska?

The Annexation of Hawaii

Since the middle of the nineteenth century, Americans had been investing in Hawaii, an independent kingdom composed of a chain of islands in the Pacific Ocean. Sugarcane grew abundantly in Hawaii, making it ideal for large-scale cultivation. Sugar plantations owned by U.S. businesses soon dominated many areas of the island nation. But American merchants and investors wanted more than economic dominance. They wanted to secure long-term access, protect their investments, and reduce the influence of the Hawaiian monarchy over trade and land rights. An 1875 treaty called the Treaty of Reciprocity created a trade deal: Hawaiian sugar could be sold tax-free in U.S. markets, which was a major benefit for Hawaii's sugar planters. In return, Americans gained special economic privileges on the islands.

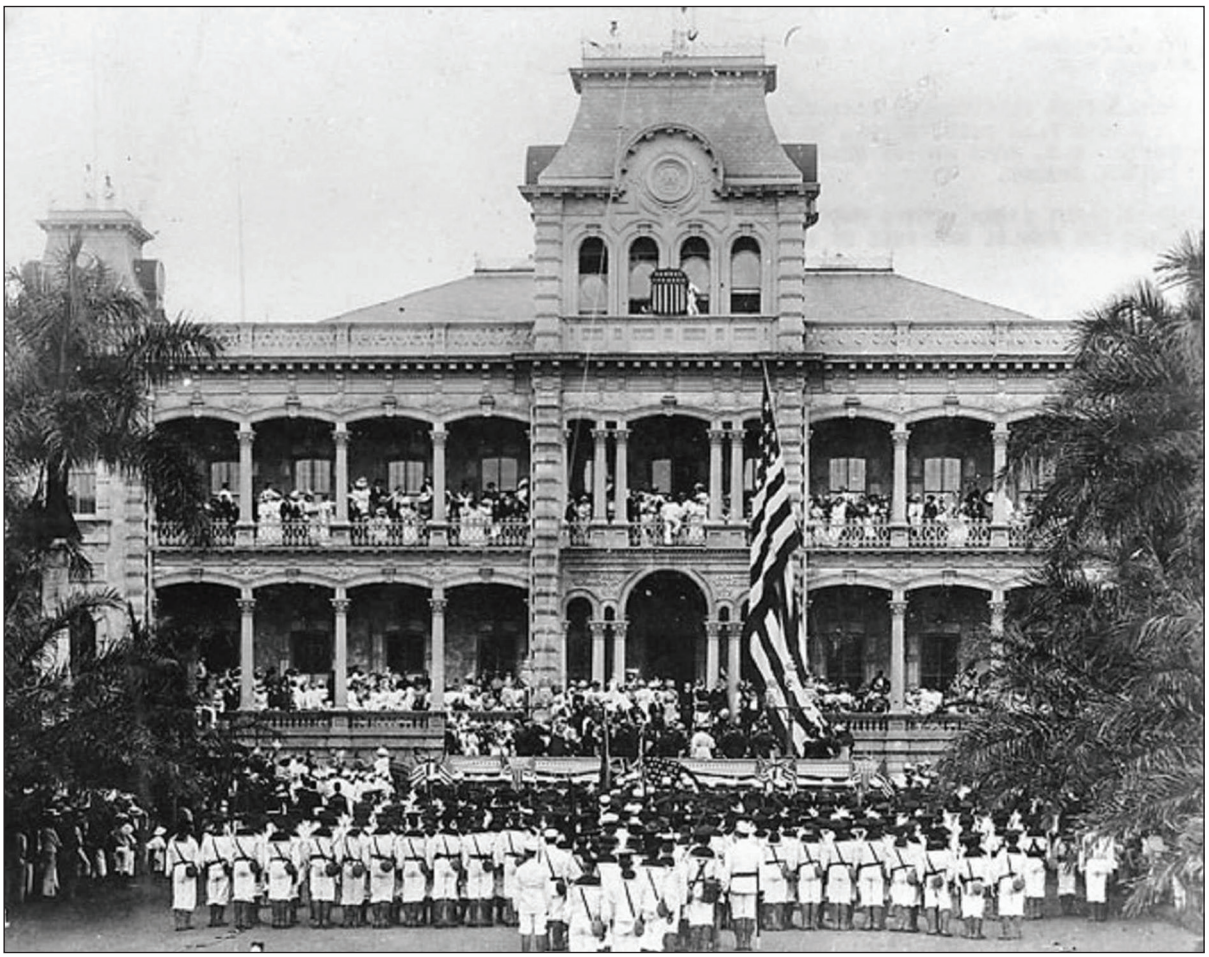
To use Hawaiian resources, Americans needed to negotiate with the monarchy that ruled Hawaii. Over time, American business leaders decided they no longer wished to negotiate with Hawaii's rulers. In 1887, a rebellion was launched against Hawaii's ruler, King Kalākaua (/kah*lah*kow*ah/). Although Kalākaua was a pro-American ruler, many white planters and businesspeople rebelled to limit his power and increase their own influence. American businesspeople took advantage of the crisis to advance their own interests. A group of Americans, including the lawyer Sanford Dole, forced the monarchy to accept a constitution that would benefit U.S. commercial interests. King Kalākaua had little choice but to agree to the constitution in 1887 under threat of armed force; it later came to be known as the "Bayonet Constitution." The constitution granted exclusive rights to the United States to use Hawaii's port of Pearl Harbor. It also limited the monarchy's power while allowing American and European residents of Hawaii to vote.

King Kalākaua died in 1891 on a trip to California. Kalākaua's successor, his sister Queen Lili'uokalani (/lee*lee*oo*oh*kah*lah*nee/), wanted to pursue policies that would increase

independence for her country. She advocated for a new constitution that would return power to the monarchy.

Dole and other American merchants in Hawaii worried that Queen Lili'uokalani's decisions would threaten their newly established economic power. If the queen resisted American influence and established taxes on sugar, profits would decline. To prevent this, the merchants formed a Committee of Safety that forced the queen to step down in 1893. U.S. Marines went ashore from warships stationed in Hawaiian ports, and sailors surrounded her palace. Faced with the power of the U.S. military, Queen Lili'uokalani surrendered, but she appealed to the U.S. government to restore her to the throne. Meanwhile, Sanford Dole and his associates founded the Republic of Hawaii, a new government run by American and European businesspeople. Dole became the republic's first president.

U.S. leaders debated whether to annex Hawaii. Supporters of annexation argued that

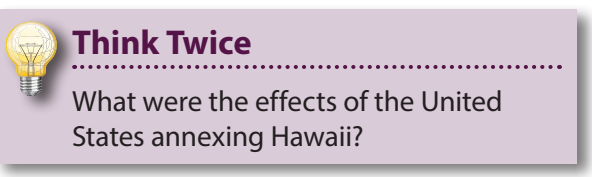


The official annexation of Hawaii in August 1898 was a formal event. The American flag now flew in front of Iolani Palace, the former residence of Hawaiian monarchs.

Hawaiian products such as sugar, bananas, and pineapples would provide a necessary boost to the U.S. economy. Also, controlling an island in the Pacific Ocean could help the United States defend its interests in Asia as well as provide another coaling station for U.S. ships. Those in favor of annexation argued that if the United States did not take control of Hawaii, another powerful nation might.

One notable opponent of annexation was President Grover Cleveland. He believed the Committee of Safety—and, by extension, the United States—had acted unlawfully in Hawaii. It had forced the queen to step down against the will of the Hawaiian people. Cleveland rejected the Committee of Safety's petition to annex Hawaii in 1893.

However, President William McKinley, who won election in 1896 and succeeded Cleveland in 1897, supported annexation. He saw Hawaii as a critical U.S. military base and coaling center in the Pacific Ocean. In August 1898, at McKinley's request, Congress voted to make Hawaii a U.S. territory. The United States took possession of ports and military equipment that had once belonged to the Hawaiian government. The greater military presence signaled an increasing American focus on controlling the Pacific Ocean.



Think Twice

What were the effects of the United States annexing Hawaii?

The Monroe Doctrine

As you learned in Unit 1, in 1823, President James Monroe delivered a message to Congress outlining how the United States believed European nations should behave in the Western Hemisphere.

Monroe declared that the Western Hemisphere—primarily meaning North and South America—was no longer open to European colonization. While the United States would not interfere with existing colonies, any European attempt to control Latin America would be seen as a hostile act. The Monroe Doctrine claimed

This cartoon shows the character "Uncle Sam," a popular figure symbolizing the United States. Here, his hat, labeled "Monroe Doctrine," claims the Western Hemisphere while figures symbolizing European countries look on from afar in the Eastern Hemisphere.

the Americas as part of the United States' **sphere of influence**, which was separate from Europe's.

Think Twice

How did the Monroe Doctrine set the stage for the United States to intervene in the Western Hemisphere?

The United States, Spain, and Cuba

In 1895, Cuban revolutionaries launched the Cuban War of Independence, a renewed effort to break free from Spanish colonial rule. This was not their first attempt, as Cubans had previously fought a failed ten-year war for independence beginning in 1868. By the 1890s, Cuban resentment of Spain had further grown due to high taxes, trade restrictions, and increasingly repressive government policies. When Spain canceled a trade agreement between Cuba and the United States in 1894, many Cubans were infuriated by the disruption to their already struggling economy. A new rebellion began.

The rebellion quickly grew, and in 1896, Spanish authorities sent General Valeriano Weyler to suppress it. To weaken the revolutionaries' rural support base, Weyler implemented a brutal policy called *Reconcentración*, or reconcentration. More than three hundred thousand Cuban civilians were forced into internment camps, where many died from starvation and disease. News of the humanitarian crisis drew international attention, especially in the United States, where newspapers published sensational accounts of Spanish atrocities.

Many Americans sympathized with the Cuban cause and called for U.S. intervention. However, President William McKinley was reluctant to go to war. He preferred diplomacy and hoped to avoid a costly conflict with Spain.

Despite McKinley's caution, pressure from the public, the press, and business interests continued to build. American leaders increasingly viewed the situation in Cuba through the lens of U.S. foreign policy goals. As the Monroe Doctrine had established, the United States wanted European countries to avoid involvement in Latin America. Spain's continued colonial control over Cuba was seen as a direct challenge to that goal.

Cuba's location in the Caribbean Sea—just ninety miles (144 km) from the southern tip of Florida—made it a strategically important neighbor. For U.S. leaders and business interests, removing Spain from Cuba was a way to reduce European influence in the region and expand American power.

Spanish rule in Cuba dated back to the voyages of Christopher Columbus and other explorers in the late fifteenth century. The island was a rich source of sugar and tobacco, both of which boosted the Spanish economy.

Cuba had become one of the world's leading sugar producers by the nineteenth century, leading to significant profits for Spain.

The United States also already had strong economic interests in Cuba. When sugar prices fell in the 1880s, Cuban sugar mills faced collapse, especially as the end of slavery in 1886 disrupted the island's labor system. American businesses stepped in by investing in the mills, importing Cuban sugar, and modernizing production. These moves stabilized the industry but increased U.S. economic control over Cuba. Over time, Cuba's economy became deeply linked to the U.S. economy.

As tensions rose in Cuba and American interest in the conflict deepened, sensational news coverage and a sudden naval disaster would soon push the United States to the brink of war.

Think Twice

Why was Cuba an attractive location for U.S. investment in the 1880s?

The Influence of "Yellow Journalism"

The American response to the crisis in Cuba was shaped not just by the events themselves but also by how those events were portrayed in the media. A new type of sensationalized news coverage known as *yellow journalism* emerged during the late 1800s and early 1900s. Newspaper owners like William Randolph Hearst (*New York Journal*) and Joseph Pulitzer (*New York World*) emphasized emotion over accuracy and turned sensational journalism into a business strategy. They saw the conflict in Cuba as a way to boost sales of their publications. These papers' coverage of Cuba's war for independence was notable for the way it focused on shocking details rather than facts. Bold, dramatic headlines and creative drawings were more likely to sell papers. To pull in a large audience with drama-filled stories, newspaper articles exaggerated both Spanish cruelty and Cuban bravery. Influenced by this emotionally charged yellow journalism, members of the American public began calling for the U.S.

As Spanish violence in Cuba continued, many Americans believed U.S. intervention was imminent. In the 1897 cartoon "Time Nearly Up," Uncle Sam watches a burning Cuba just ninety miles (144 km) away.

government to demand that Spain withdraw from the island nation of Cuba.

A particular piece of news further turned public opinion against Spain in February 1898. The Spanish ambassador to the United States, Enrique Dupuy de Lôme, wrote a letter to the foreign minister of Spain in which he criticized President McKinley for being weak and indecisive. De Lôme accused McKinley of giving in too easily to the American public and repeating whatever the press said about Spain. The letter fell into the hands of Cuban revolutionaries, who leaked it to the American press. The incident quickly made national news, and the Spanish ambassador's apparent insult to the president and to American dignity enraged readers across the country. The *New York Journal* called the de Lôme letter "the worst insult to the United States in its history." Tensions continued to rise between the United States and Spain.

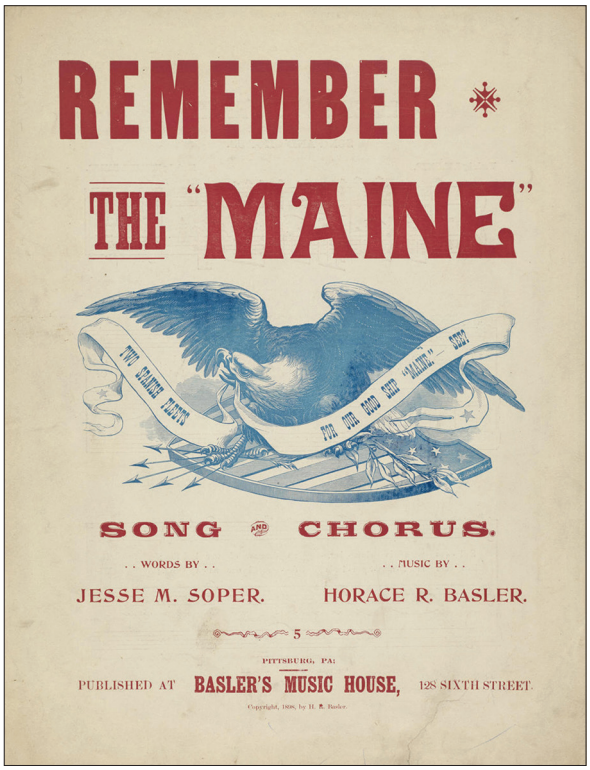
Think Twice

How did the press shape American public opinion about the Cuban War of Independence?

"Remember the *Maine*"

Shortly after the scandal of the de Lôme letter, a tragedy convinced both the American public and the president that the United States needed to intervene against the Spanish in Cuba. In January 1898, to protect American citizens and interests on the island, the U.S. military had stationed the battleship USS *Maine* in Cuba's Havana Harbor. Three weeks later, on February 15, an explosion on the *Maine* killed more than 260 crew members and sank the ship.

The cause of the explosion was undetermined at the time. Some investigators suggested a mine in the harbor had exploded. The event's timing, combined with strong anti-Spanish sentiment, led many Americans to blame Spain. The *New York World* and the *New York Journal* published rumors that Spain sank the ship on purpose. "Remember the *Maine*" became a popular catchphrase and battle cry



"Remember the *Maine*" became a patriotic slogan and the title of several patriotic songs. Many Americans viewed the sinking of the USS *Maine* as a sign that the United States needed to defend itself against Spain in Cuba.

for Americans who, in the name of revenge, wanted the United States to declare war on Spain. One headline called the sinking of the *Maine* "Spanish treachery."

In April 1898, President McKinley asked Congress to approve a declaration of war against Spain. Regardless of the reason the *Maine* sank, McKinley said, the explosion was the latest in a long line of events showing "a state of things in Cuba that is intolerable." He argued that U.S. interference was needed to establish a stable Cuban government and bring order to the island. On April 25, 1898, Congress approved a declaration of war against Spain.

Think Twice

Why did the United States decide to go to war with Spain?

The Spanish-American War

Entering the Spanish-American War, the United States had a strong and well-supplied naval force. It was equipped with modern ships and weapons. Theodore Roosevelt, the assistant secretary of the navy at the time, had pushed for war and had encouraged the U.S. Navy to practice battle tactics in anticipation of fighting soon. These preparations helped the United States gain a decisive advantage against the Spanish. Much of the war was fought at sea. The war extended to battles between Spanish and American fleets far beyond Cuba, as Americans fought to topple Spanish control of the seas in other parts of the world.

The Philippines, a group of islands in the southern Pacific Ocean, had been under Spanish colonial rule for more than three hundred years. As war with Spain began in 1898, the United States planned to target Spanish holdings beyond the Caribbean, including the Philippines. On May 1, at the Battle of Manila Bay, U.S. forces led by Commodore George Dewey defeated the Spanish fleet stationed there. This early victory gave the United States control of the bay.

After defeating Spain's fleet at Manila Bay, American troops landed in Cuba. While the U.S. Navy was strong and well-prepared, the U.S. Army was much smaller and less equipped for a major foreign war. To meet the need for more ground troops, the government had called for volunteers. One of the most famous volunteer units was the First U.S. Volunteer Cavalry, also known as the Rough Riders. Theodore Roosevelt had helped raise this unit and led it himself in battle. Alongside the Rough Riders, African American regiments such as the Ninth and Tenth Cavalries and other U.S. volunteer and regular army units fought bravely in Cuba. On July 1, 1898, they took part in a decisive land battle at San Juan Hill, part of a larger effort to capture Santiago, Cuba's second-largest city. The Americans defeated the Spanish forces,

leading to the surrender of Spanish troops in Santiago soon afterward. With Spain's forces overwhelmed, it was clear that the United States would win the war.

Less than eight months after it began, the conflict officially ended on December 10, 1898, with the signing of the Treaty of Paris. Spanish forces withdrew from Cuba in defeat. U.S. secretary of state John Hay called the short-lived Spanish-American War "a splendid little war." Though the conflict was relatively short, the cumulative effect of disease and battle claimed thousands of American, Spanish, and Cuban lives. In fact, fewer than four hundred Americans were killed in combat, but thousands more died from diseases such as yellow fever.

Think Twice

How did the United States win the Spanish-American War?

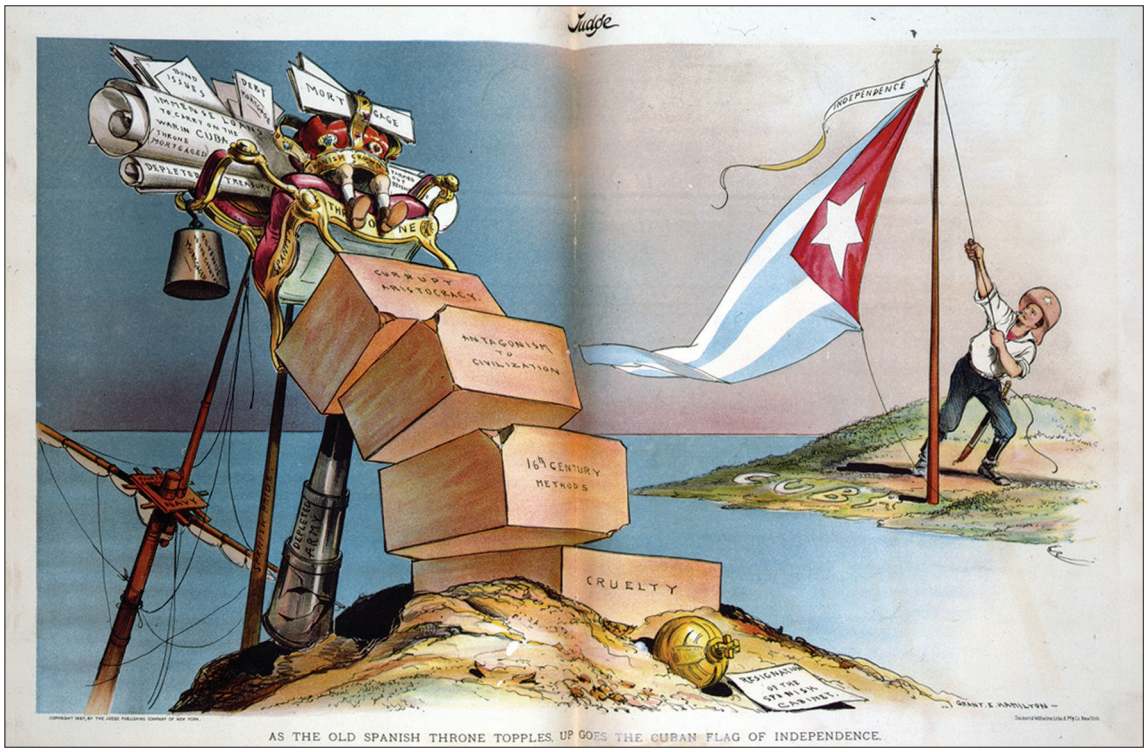
The New American Empire

The United States' victory in the Spanish-American War represented the end of the declining Spanish Empire, at least in the Western Hemisphere. The Treaty of Paris forced Spain to surrender its last remaining territories in the Western Hemisphere—Cuba and Puerto Rico, both in the Caribbean Sea—to the United States. The global balance of power was shifting toward the United States and its growing empire. As the nineteenth century ended and the twentieth century began, this empire would boost the American economy and its international standing with additional trade markets and areas of influence. It would also cause controversy both in the United States and abroad.

Acquisitions in the Spanish-American War

The acquisition of Puerto Rico expanded American economic opportunities in the Caribbean. Like Hawaii, Puerto Rico was rich with sugarcane. After the war, U.S. corporations acquired large amounts of land there and took control of the island's sugarcane operations, reshaping its economy. Additionally, the United States built naval stations on the island, expanding its military influence in the region.

The United States had also acquired two new holdings in the Pacific Ocean—the island of Guam and the thousands of islands that compose the Philippines. During the Treaty of Paris negotiations, Spanish representatives resisted ceding the Philippines. They ultimately agreed to transfer control of the islands in exchange for $20 million. The Philippines provided the United States another gateway to trade with China, as well as an additional coaling station for ships. U.S. leaders decided not to grant the Philippines independence, believing the country was not ready to govern

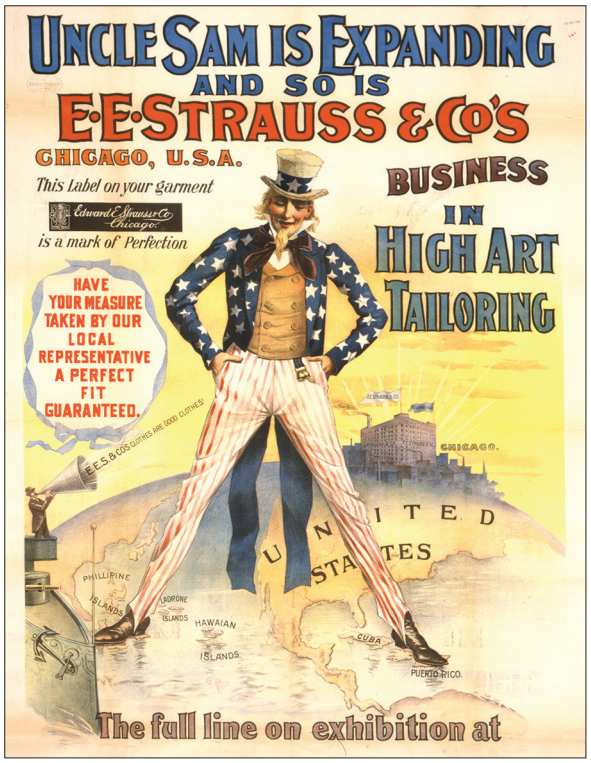


The United States saw the end of the Spanish Empire as a victory not only for Cuba but also for independence around the world. This cartoon portrays Spanish colonial power as a remnant of an old, cruel world where monarchs ruled.

United States Territorial Acquisitions, 1898	
Territory	**Notes**
Hawaii	Annexed by the United States on July 7, 1898, before the U.S.–Spain armistice on August 12, 1898
Puerto Rico	Acquired from Spain on December 10, 1898, via the Treaty of Paris; remains a U.S. territory today
Guam	Acquired from Spain on December 10, 1898, via the Treaty of Paris; remains a U.S. territory today
Philippines	Acquired from Spain on December 10, 1898, via the Treaty of Paris, sparking armed resistance from Filipino revolutionaries in 1899
Cuba	Spain relinquished control on December 10, 1898, via the Treaty of Paris; officially independent in 1902, with United States retaining right to intervene under the Platt Amendment (1901)

At the end of the Spanish-American War, the United States held partial control of Cuba (which was independent, at least on paper) and total control of Puerto Rico, Guam, the Philippines, and Hawaii.

itself and wanting to maintain control over the valuable territory. However, the Filipino people, who had already been resisting Spanish rule, were unhappy with this outcome. As they saw it, their government had been transferred to another imperial leader that was no better than the last; they wanted independence. From 1899 to 1902, the Philippines fought the United States in the Philippine-American War. Filipino forces mounted a determined resistance



The United States' imperial ambitions were well-known enough in the late nineteenth century to be referenced in American popular culture. This advertisement for an American clothing tailor shows an "expanding" Uncle Sam with one foot on the Philippines and another foot on Puerto Rico.

but, after heavy losses, were ultimately defeated. The United States established a military government in the Philippines, which remained in place until 1901, when a limited civilian administration—an American-appointed commission with only partial authority—was introduced. The United States continued to control the Philippines until after World War II.

Think Twice

Why was the Spanish-American War a significant political and economic event for the United States?

Changes in Cuba

After the Spanish-American War, the United States changed its stance toward Cuban autonomy. Before the war began, it seemed that the United States planned to let Cuba govern itself independently. Senator Henry Teller, who was critical of U.S. imperialism, added an amendment known as the Teller Amendment to the declaration of war with Spain in April 1898. This amendment stated that the United States would not permanently control Cuba.

However, as Cuba was creating its own constitution after the war, the United States wanted to establish guidelines for future

The Cuban protectorate added more power to the growing U.S. empire. In this cartoon, Uncle Sam waits to harvest an apple labeled "Cuba." The apples in his basket represent U.S. states and territories that were acquired in the nineteenth century, including Louisiana, California, and Alaska.

U.S.–Cuba relations. At the end of a 1901 act that set aside funding for the U.S. Army, Congress included an amendment to be added to the new Cuban constitution, sponsored by Senator Orville Platt.

The Platt Amendment, as it came to be known, allowed the United States to intervene in Cuban affairs to protect its independence and to ensure "the maintenance of a government adequate for the protection of life, property, and individual liberty." Further, it forbade Cuba from transferring land to any foreign country except the United States. It also established a U.S. naval base in Cuba's Guantánamo Bay and gave the United States the right to buy more Cuban land.

At first, Cuban leaders refused to add the Platt Amendment to their country's new constitution. However, they eventually agreed to include it after the United States

PRIMARY SOURCE: THE PLATT AMENDMENT, 1901

Whereas the Congress of the United States of America, by an Act approved March 2, 1901, provided as follows:

. . . The President is hereby authorized to "leave the government and control of the island of Cuba to its people" so soon as a government shall have been established in said island under a constitution which, either as a part thereof or in an ordinance appended thereto, shall define the future relations of the United States with Cuba, substantially as follows:

"I. That the government of Cuba shall never enter into any treaty or other compact with any foreign power or powers which will impair or tend to impair the independence of Cuba, nor in any manner authorize or permit any foreign power or powers to obtain by colonization or for military or naval purposes or otherwise, lodgement in or control over any portion of said island."

"II. That said government shall not assume or contract any public debt. . . ."

"III. That the government of Cuba consents that the United States may exercise the right to intervene for the preservation of Cuban independence. . . ."

"IV. That all Acts of the United States in Cuba during its military occupancy thereof are ratified and validated, and all lawful rights acquired thereunder shall be maintained and protected."

Source: Treaty Between the United States and the Republic of Cuba Embodying the Provisions Defining Their Future Relations. Cuba-U.S., May 22, 1903, 33 Stat. 2248.

refused to otherwise withdraw its military forces from Cuba. Essentially, the amendment made the supposedly independent Cuba a U.S. **protectorate**, or a country guarded—and controlled—by another, more powerful country.

Think Twice

Why was Cuba reluctant to agree to the terms of the Platt Amendment?

The Open Door Policy

Across the Pacific Ocean, the United States wanted to further secure its trading power in China. New U.S. control over Hawaii, the Philippines, and Guam gave the country greater strategic reach in the Pacific. However, other powerful countries had trade interests in China, including Britain, Russia, Germany, France, and Japan. In 1899, Secretary of State John Hay sent a series of notes to the leaders of these countries. These notes, designed to secure international agreement regarding free trade in China, laid out principles that became known as the Open Door policy.

Hay proposed that all nations operating in China enjoy equal access to trade and an open market. He also insisted that only the Chinese government, not individual foreign powers, collect taxes on this trade. Foreign powers often tried to collect these taxes in the regions they controlled, so Hay's proposal helped prevent one nation from gaining an unfair advantage and encouraged international cooperation by reducing the chances of disputes among competing powers. The United States supported this approach because it wanted a larger share of the lucrative Chinese market without controlling territory. Hay also wanted to prevent any one country from dominating Chinese trade by granting itself economic advantages in its spheres of influence in China. Compared to European countries and Japan, the United States had little influence

U.S. International Trade in Imports and Exports, 1861–1900

Year	Exports (in Millions of Dollars)	Imports (in Millions of Dollars)	Balance of Trade (Difference in Value)
1861	228.5	298	–69.5
1870	412.3	449	–36.7
1880	851.1	681.3	+169.8
1890	881.6	845.4	+36.2
1900	1,394.5	858.4	+536.1

As the United States expanded its global influence in the latter half of the nineteenth century, it increased the profits it earned from trade. In 1880, 1890, and 1900, the United States achieved a trade surplus, which happens when the value of exports exceeds the value of imports.

in China. Eventually, Hay feared, China would be broken up into separate colonies, and the United States would lose its trading foothold there.

Although the other powers did not formally endorse Hay's policy, none directly rejected it, and Hay declared that the Open Door principles had been accepted. For many American merchants, the Open Door policy was a positive development. It eventually guided American foreign policy in East Asia for the first half of the twentieth century.

Complications arose in China almost immediately. A movement led by Chinese martial artists, who were called "Boxers" by Westerners, opposed foreign influence in China. The Boxers attracted support from people who wanted to restore China's control of its own affairs. In 1900, the Boxers launched a revolt against foreign influence, which became known as the Boxer Rebellion. The Boxers attacked, imprisoned, and killed foreigners in China, including Western missionaries and Chinese converts to Christianity. The United States, along with Japan and several European countries, sent troops to suppress the uprising and rescue those imprisoned in Beijing.

Some nations responded by reinforcing their military presence and tightening control in

While Hay quickly secured the support of Britain and Japan for the Open Door policy in China, Germany and Russia were more difficult to convince. This cartoon portrays the United States, Britain, and Japan pulling in the direction of an Open Door policy while Russia, Germany, and France pull in the direction of trade restrictions.

their spheres of influence, where they claimed special rights over trade and investment. To Hay, this response put the Open Door policy at even greater risk. If the Boxers succeeded in forcing foreign powers out of China, the "open door" for trade might permanently close. Hay sent another note that emphasized the need to preserve Chinese territory and respect its government. Although the Boxer Rebellion ended in September 1901, it deepened international involvement in China and reinforced the United States' commitment to the Open Door policy as a cornerstone of its foreign policy in Asia.

Think Twice

What was the Open Door policy, and why did some Chinese groups like the Boxers attack foreigners, including Americans, because of it?

Anti-Imperialism

The American public was divided in its response to the country's expansionist foreign policy. Americans who opposed imperialism did so for many reasons. Some felt colonialism, and the way it used military force to take control of other countries, was morally wrong. Others—like William Jennings Bryan, whom you learned about in Unit 2—felt that if the United States did not allow its territories to govern themselves, the country was betraying its founding ideals of democracy and freedom. They pointed out that the United States itself had broken free of British colonial rule in the American Revolution and that this independence had not been gained to subject others to an American empire. In addition to these moral concerns, many critics raised economic objections. They argued that maintaining overseas colonies would be too expensive, requiring ongoing investment in infrastructure, administration, and defense. Some feared that imperialism would force the United States to expand its military permanently and become entangled in foreign conflicts. These critics believed that such commitments would drain the nation's resources and undermine its ability to focus on domestic needs. One of the most vocal critics was Senator George F. Hoar of Massachusetts, who believed imperialism betrayed American principles of self-government and liberty. He warned that ruling over others without their consent would damage the nation's moral standing.

Opponents of expansion and imperialism formed organizations and were vocal. In 1898, a group called the Anti-Imperialist League formed to oppose American annexation of the Philippines. The league was composed of people from diverse professional backgrounds and included writer Mark Twain, industrialist Andrew Carnegie, and former Massachusetts governor George Boutwell. The league's platform, published in 1899, accused the United States of violating the liberty of others and its own democratic principles:

PRIMARY SOURCE: OPEN DOOR NOTE, JOHN HAY, 1899

To insure . . . to the commerce of all nations in China the undoubted benefits which should accrue from a formal recognition by the various powers claiming "spheres of interest" that they shall enjoy perfect equality of treatment for their commerce and navigation within such "spheres," the Government of the United States would be pleased to see His German Majesty's Government give formal assurances, and lend its cooperation in securing like assurances from the other interested powers, that each, within its respective sphere of whatever influence—

First. Will in no way interfere with any treaty port or any vested interest within any so-called "sphere of interest" or leased territory it may have in China.

Second. That the Chinese treaty tariff of the time being shall apply to all merchandise landed or shipped to all such ports as are within said "sphere of interest" (unless they be "free ports"), no matter to what nationality it may belong, and that duties so leviable shall be collected by the Chinese Government.

Third. That it will levy no higher harbor dues on vessels of another nationality frequenting any port in such "sphere" than shall be levied on vessels of its own nationality, and no higher railroad charges over lines built, controlled, or operated within its "sphere" on merchandise belonging to citizens or subjects of other nationalities transported through such "sphere" than shall be levied on similar merchandise belonging to its own nationals transported over equal distances.

Source: Hay, John. Letter to Andrew D. White, September 6, 1899. In *Papers Relating to the Foreign Relations of the United States, with the Annual Message of the President Transmitted to Congress December 5, 1899*. Washington, D.C.: Government Printing Office, 1901, pp. 129–130.

> We hold that the policy known as imperialism is hostile to liberty and tends toward militarism, an evil from which it has been our glory to be free. We regret that it has become necessary in the land of Washington and Lincoln to reaffirm that all men, of whatever race or color, are entitled to life, liberty, and the pursuit of happiness. . . . We insist that the subjugation [oppressive control] of any people is "criminal aggression" and open disloyalty to the distinctive principles of our government.

The Anti-Imperialist League's criticism reflected a broader national debate about what kind of global power the United States should become and whether expansion could ever be consistent with American democratic

ideals. The league dissolved in 1920, but its efforts showed that imperialism had many passionate critics at home.

Think Twice

Why was imperialism controversial in the United States?

Theodore Roosevelt's Presidency

Theodore Roosevelt, who became president in 1901, played a decisive role in growing American power. Before becoming vice president to William McKinley, he expanded his influence on the national stage by serving as assistant secretary of the navy, where he advocated for a stronger U.S. military presence abroad. Roosevelt drew on ideas promoted by naval strategist Alfred Thayer Mahan, who argued that national greatness depended on naval power, possession of overseas bases, and control of key sea routes.

When President McKinley was assassinated in September 1901 during a public appearance in Buffalo, New York, Roosevelt became president. Though he promised to continue McKinley's policies, Roosevelt quickly began charting his own course, emphasizing reform, conservation, and a bold new vision for America's role in the world.

The Roosevelt Corollary

During Roosevelt's presidency, a crisis in Venezuela drew American attention. In the 1890s, Venezuela had experienced civil wars and political instability. Despite this chaos, European nations, especially Germany, France, and Britain, had loaned and invested money in the country. Germany, in particular, had funded a major railroad project. When Venezuela's new president blocked all foreign loan repayments in 1899, leading to default in 1901, Germany, Britain, and Italy threatened military action. In December 1902, their forces seized territory and blockaded Venezuelan ports. Roosevelt feared this European intervention would set a dangerous precedent. Like President Monroe long before him, he believed European involvement in the Americas threatened

Theodore Roosevelt was known for his assertive leadership style before he became president. He was a strong supporter of U.S. expansion abroad, having fought to defend the United States' imperial interests in the Spanish-American War.

PRIMARY SOURCE: "MARCH OF THE FLAG," ALBERT BEVERIDGE, 1898

Shortly after the Spanish-American War, U.S. senator Albert Beveridge gave a speech titled "March of the Flag," in which he made a case for American imperial expansion and the spread of U.S. influence abroad.

In this campaign, the question is larger than a party question. It is an American question. It is a world question. Shall the American people continue their resistless march toward the commercial supremacy of the world? Shall free institutions broaden their blessed reign as the children of liberty wax in strength, until the empire of our principles is established over the hearts of all mankind? Have we no mission to perform, no duty to discharge to our fellow-man? Has the Almighty Father endowed us with gifts beyond our deserts and marked us as the people of His peculiar favor, merely to rot in our own selfishness, as men and nations must, who take cowardice for their companion and self for their Deity—as China has, as India has, as Egypt has? . . .

. . . To-day, we are making more than we can use. To-day, our industrial society is congested; there are more workers than there is work; there is more capital than there is investment. We do not need more money—we need more circulation, more employment. Therefore we must find new markets for our produce, new occupation for our capital, new work for our labor. And so, while we did not need the territory taken during the past century at the time it was acquired, we do need what we have taken in 1898, and we need it now. . . .

. . . For the conflicts of the future are to be conflicts of trade—struggles for markets—commercial wars for existence. . . . So Hawaii furnishes us a naval base in the heart of the Pacific; the Ladrones another, a voyage further into the region of sunset and commerce; Manila, another, at the gates of Asia—Asia, to the trade of whose hundreds of millions American merchants, American manufacturers, American farmers, have as good a right as those of Germany or France or Russia or England; Asia, whose commerce with England alone, amounts to billions of dollars every year; Asia, to whom Germany looks to take the surplus of her factories and foundries and mills; Asia, whose doors shall not be shut against American trade. Within two decades the bulk of Oriental commerce will be ours—the richest commerce in the world. In the light of that golden future, our chain of new-won stations rise like ocean sentinels from the night of waters—Porto Rico, a nobler Gibraltar; the Isthmian canal, a greater Suez; Hawaii, the Ladrones, the Philippines, commanding the Pacific!

Source: Beveridge, Albert J. *The "March of the Flag": Beginning of Greater America.* Indianapolis, 1898.

U.S. dominance in the region. He insisted that maintaining order in the Western Hemisphere should be the United States' responsibility—what he called keeping order in "our backyard." The crisis ended in 1903 after the blockade devastated Venezuela's economy and forced its government to agree to repay the debts using future customs revenues. Roosevelt was determined to prevent such foreign intervention from happening again. In 1904–5, he issued the Roosevelt Corollary to the Monroe Doctrine. (A corollary is a statement added to support an earlier statement.)

The corollary stated that the United States could intervene in a Latin American country as a last resort to prevent wrongdoing—such as failing to pay debts, political instability, or corruption—that might invite European intervention. The sole power to decide what was and was not wrongdoing was claimed by President Roosevelt. This gave the United States the authority to act as an

In his 1900 campaign for reelection, McKinley claimed that the imperialism of his previous term had noble motives "for humanity's sake." A campaign poster from the time praises U.S. intervention in the Spanish-American War on Cuba's behalf, contrasting a desolate, Spanish-ruled Cuba in 1896 (shown on the left) with a thriving, U.S.-influenced Cuba in 1900 (shown on the right).

"international police power" in the Western Hemisphere. The Roosevelt Corollary followed the spirit of the Monroe Doctrine but took a more active, hands-on approach. In the Dominican Republic, U.S. forces intervened repeatedly—first in 1903 and 1904, and again in 1905 when the United States assumed control over the country's customs agency to manage debt repayment. They returned in 1912 and 1914 to mediate internal conflict, and a full-scale military occupation began in 1916, lasting until 1924. The Roosevelt Corollary also justified interventions in Cuba (1906–9), Nicaragua (1909–10, 1912–33), Haiti (1915–34), and Panama (multiple interventions from 1908 to 1925).

Think Twice

How did the Roosevelt Corollary establish the United States as an international police power?

"Big Stick" Diplomacy

Roosevelt described his foreign policy approach with the saying "Speak softly and carry a big stick." To "speak softly" meant to use persuasion in diplomacy and avoid doing harm. To "carry a big stick" meant to be prepared to use force when necessary to deter others or protect national interests. Roosevelt had used the phrase earlier in his career to support the expansion of U.S. naval power, preparing the "big stick" of military power to handle potential conflict.

Theodore Roosevelt visited the Naval School in Rio de Janeiro, Brazil, in 1913, after his presidency and before an expedition on the Amazon River. During his time in office, Roosevelt's foreign policy emphasized a strong naval presence to protect U.S. interests.

Roosevelt's philosophy reflected the beliefs of many imperialists at the time, who argued that the United States had a duty to bring order, progress, and American values to other parts of the world—even if it meant using force to do so.

Think Twice

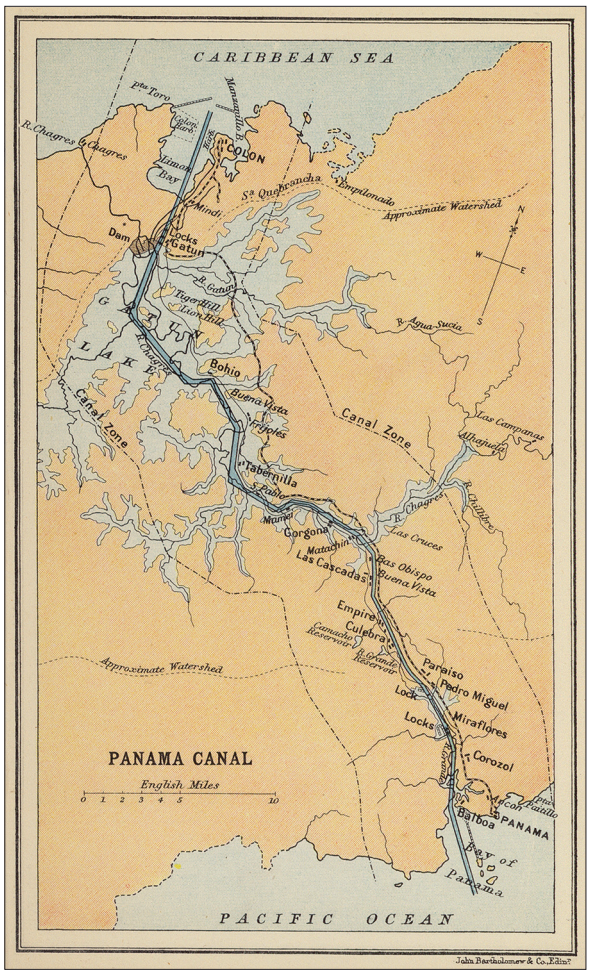
What did "Speak softly and carry a big stick" mean, and why were both parts of the expression important to Roosevelt's foreign policy?

The Panama Canal

One of Roosevelt's long-term economic goals was to build a canal that connected the Atlantic and Pacific Oceans. The United States, Britain, and France had discussed building such a canal as early as 1850. France began work on a canal in the 1880s, and the United States considered a route through Nicaragua. However, due to uncertainty about where to

build the canal and how to pay for it—along with the challenges of the labor itself—the project had not yet taken off. Roosevelt decided it was time to make the idea a reality.

A canal would provide essential support for U.S. trade, businesses, and the military. Ships would be able to carry goods relatively quickly between the Atlantic and Pacific coasts, avoiding the long and dangerous 13,000-mile (20,900 km) journey around the tip of South America. The canal would cut the distance to about 5,200 miles (8,400 km), saving weeks of travel time. The navy would have more room to maneuver warships as it defended U.S. territories in the Caribbean and Pacific. During the Spanish-American War, U.S. ships had taken the long route around South America. The faster route made possible by a canal could help the United States overpower European competitors and dominate the Caribbean.



This map shows the route the canal would take, cutting through the country of Panama and connecting the Atlantic and Pacific Oceans.

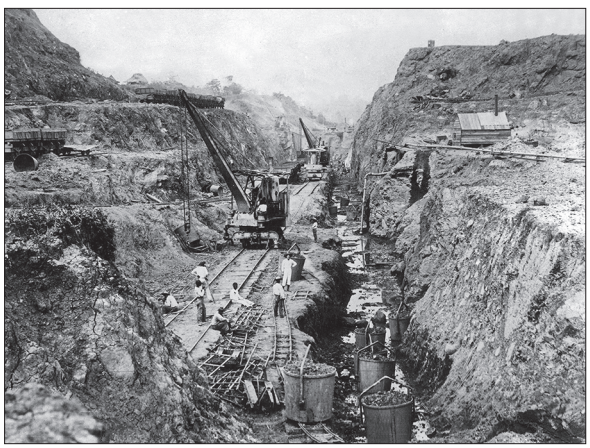
However, the canal would need the support of countries in Central America, specifically those on the isthmus connecting North and South America, because builders would have to cut through these countries' land. McKinley had recommended a route through Nicaragua. However, Roosevelt pushed for a route through Panama. At the time, Panama was a state that belonged to the neighboring country of Colombia. The U.S. Senate tried to negotiate with Colombian leaders for the rights to build and use a canal, but Colombia rejected the plan.

Roosevelt was able to obtain the land he needed by taking advantage of unrest in Central America. Panamanians had resisted Colombian rule for many decades, and in November 1903, a group of Panamanian rebels declared independence from Colombia. French and American businesspeople who would benefit financially from the potential canal encouraged Roosevelt to support the rebels. If Roosevelt helped create a new Republic

of Panama, he could secure land for the canal zone. Roosevelt sent U.S. warships to the coast of Panama to prevent Colombian forces from quashing the rebellion. The use of warships to enforce foreign policy became known as gunboat diplomacy.

The intervention worked, and Panama became an independent nation. The newly formed Panamanian government signed a treaty granting the United States control of a ten-mile-wide (16 km) Canal Zone in exchange for $10 million. This zone would be governed by the United States. Although Colombia had opposed the U.S. role in Panama's independence, the United States would later, in 1921, pay Colombia $25 million in compensation.

In 1911, after leaving office, Roosevelt acknowledged that he had bypassed standard democratic procedures but defended his choice to secure the Canal Zone immediately without receiving approval from Congress. "I took the isthmus, started the canal, and then left Congress not to debate the canal but to debate me," he said. Rather than waiting for Congress to agree on a proposal for a canal, Roosevelt wanted to get started right away. He urged builders to "make the dirt fly."



Here, workers construct a path for the Panama Canal between large walls of land. The workers who built the canal faced many dangers, including the risk of landslides.

The canal effort took a decade of engineering and hard labor, and this labor came at the cost of human lives. Thousands of workers, many of them from the Caribbean, shoveled tons of dirt and rock in high temperatures. Dynamite was used to blast holes into mountains during construction. Workers died in landslides, mudslides, and dynamite accidents. Diseases like malaria and yellow fever had killed many workers during previous canal-building attempts, so the United States put sanitation procedures in place. Even with these protections, however, workers routinely died of illness. The official death toll during canal construction was 5,609 people, but the actual number of deaths is likely higher. Though the canal was a remarkable engineering achievement, it came at great human cost. When it opened in 1914, however, the Panama Canal was celebrated around the world as a triumph of modern engineering, symbolizing U.S. power and ingenuity.

Think Twice

Why was the building of the Panama Canal both controversial and celebrated?

William Howard Taft's "Dollar Diplomacy"

During his two terms as president, from 1901 to 1909, Roosevelt worked alongside William Howard Taft, a Republican politician from Cincinnati, Ohio. Taft was named the U.S. civilian, or nonmilitary, governor of the Philippines in 1901, as the Philippine-American War was coming to an end. His job included supporting the Filipino government and economic development, such as supervising the building of roads and schools. After becoming Roosevelt's secretary of war in 1904, he asked to remain involved in the Philippines. In his new role, Taft also helped oversee military and infrastructure projects, including the Panama Canal. At the end of his second term, Roosevelt personally chose Taft as his successor in the 1908 presidential campaign, which Taft won against Democratic nominee William Jennings Bryan.

Taft took a new approach to foreign policy, one that relied more on economic investment and less on the blunt military force used by Roosevelt. He described this policy to Congress in 1912 as substituting "dollars for bullets." His critics began calling the approach "Dollar Diplomacy." Taft had noticed how Roosevelt used peaceful diplomacy to take control of the Dominican Republic's finances and avoid European intervention. He thought

As president, William Howard Taft took an economics-centered approach to foreign policy, using U.S. finances to advance American interests in foreign countries.

a similar economics-based approach could stabilize other foreign governments. Taft also saw international diplomacy as a way to promote U.S. business interests overseas. For instance, government officials promoted the sale of American products in other countries.

In 1910–12, the United States put Dollar Diplomacy to work in Nicaragua, first supporting a rebellion that overthrew Nicaragua's president, who opposed American influence. In his place, the United States installed Nicaraguan rebel leaders more friendly to U.S. interests. The new

PRIMARY SOURCE: DOLLAR DIPLOMACY, WILLIAM HOWARD TAFT, 1912

In this 1912 message to Congress, president William Howard Taft promoted a foreign policy known as Dollar Diplomacy, which aimed to use American financial investments and economic influence to strengthen U.S. power and interests in other countries.

In China the policy of encouraging financial investment to enable that country to help itself has had the result of giving new life and practical application to the open-door policy. The consistent purpose of the present administration has been to encourage the use of American capital in the development of China by the promotion of those essential reforms to which China is pledged by treaties with the United States and other powers. The hypothecation [pledging of assets] to foreign bankers in connection with certain industrial enterprises, such as the Hukuang railways, of the national revenues upon which these reforms depended, led the Department of State early in the administration to demand for American citizens participation in such enterprises, in order that the United States might have equal rights and an equal voice in all questions pertaining to the disposition of the public revenues concerned. . . .

In Central America the aim has been to help such countries as Nicaragua and Honduras to help themselves. They are the immediate beneficiaries. The national benefit to the United States is twofold. First, it is obvious that the Monroe doctrine is more vital in the neighborhood of the Panama Canal and the zone of the Caribbean than anywhere else. There, too, the maintenance of that doctrine falls most heavily upon the United States. It is therefore essential that the countries within that sphere shall be removed from the jeopardy involved by heavy foreign debt and chaotic national finances and from the ever-present danger of international complications due to disorder at home. Hence the United States has been glad to encourage and support American bankers who were willing to lend a helping hand to the financial rehabilitation of such countries because this financial rehabilitation and the protection of their customhouses from being the prey of would-be dictators would remove at one stroke the menace of foreign creditors and the menace of revolutionary disorder.

Source: Taft, William Howard. "Message of the President." In *Papers Relating to the Foreign Relations of the United States, with the Annual Message of the President Transmitted to Congress December 3, 1912*. Washington, D.C.: Government Printing Office, 1919, pp. xi–xii.

Here, Taft, his wife, and other Americans travel to the Philippines. Taft was head of the Second Philippine Commission, a group of American politicians tasked with creating a Filipino civil government that resembled the U.S. government.

Nicaraguan leaders accepted a U.S. loan, which came with conditions: The United States would control Nicaraguan banks and customs collections and bring in a U.S.-backed railroad company. However, the Nicaraguan people resented this intrusion. Where Taft saw a peaceful intervention, they saw a foreign takeover of their banks and railroads. When another rebellion threatened the U.S.–Nicaraguan arrangement, Taft sent in U.S. Marines to put it down. While Taft described his policy as economic intervention, in practice it,

PRIMARY SOURCE: LATIN AMERICA POLICY, WOODROW WILSON, 1913

President Woodrow Wilson's "moral diplomacy" guided his foreign policy in Latin America, as reflected in this memo to U.S. diplomats stationed in Latin America. This approach emphasized supporting democratic governments and promoting ethical principles in international relations.

One of the chief objects of my administration will be to cultivate the friendship and deserve the confidence of our sister republics of Central and South America, and to promote in every proper and honorable way the interests which are common to the peoples of the two continents. . . .

. . . We are the friends of peace, but we know that there can be no lasting or stable peace in such circumstances. As friends, therefore, we shall prefer those who act in the interest of peace and honor, who protect private rights, and respect the restraints of constitutional provision. Mutual respect seems to us the indispensable foundation of friendship between states, as between individuals.

The United States has nothing to seek in Central and South America except the lasting interests of the peoples of the two continents, the security of governments intended for the people and for no special group or interest, and the development of personal and trade relationships between the two continents which shall redound [accrue] to the profit and advantage of both and interfere with the rights and liberties of neither.

Source: Wilson, Woodrow. Memorandum to American diplomatic officers in Latin America, March 12, 1913. In *Papers Relating to the Foreign Relations of the United States, with the Address of the President to Congress December 2, 1913*. Washington, D.C.: Government Printing Office, 1920, p. 7.

too, relied on military force to protect U.S. interests.

Taft also brought Dollar Diplomacy to China, where the United States still sought greater economic influence. In 1909, Taft supported a plan for U.S. bankers to join a group of international investors financing a major railroad project in central China. The goal was to secure American access to Chinese markets and prevent European powers and Japan from dominating the region economically. Taft believed that encouraging U.S. investment in China would promote peace and stability through economic growth. However, many Chinese nationalists viewed the railroad deal, and foreign control over Chinese infrastructure in general, as another form of imperialism.

Think Twice

How did Taft's approach to foreign policy compare to Roosevelt's?

The United States in Mexico

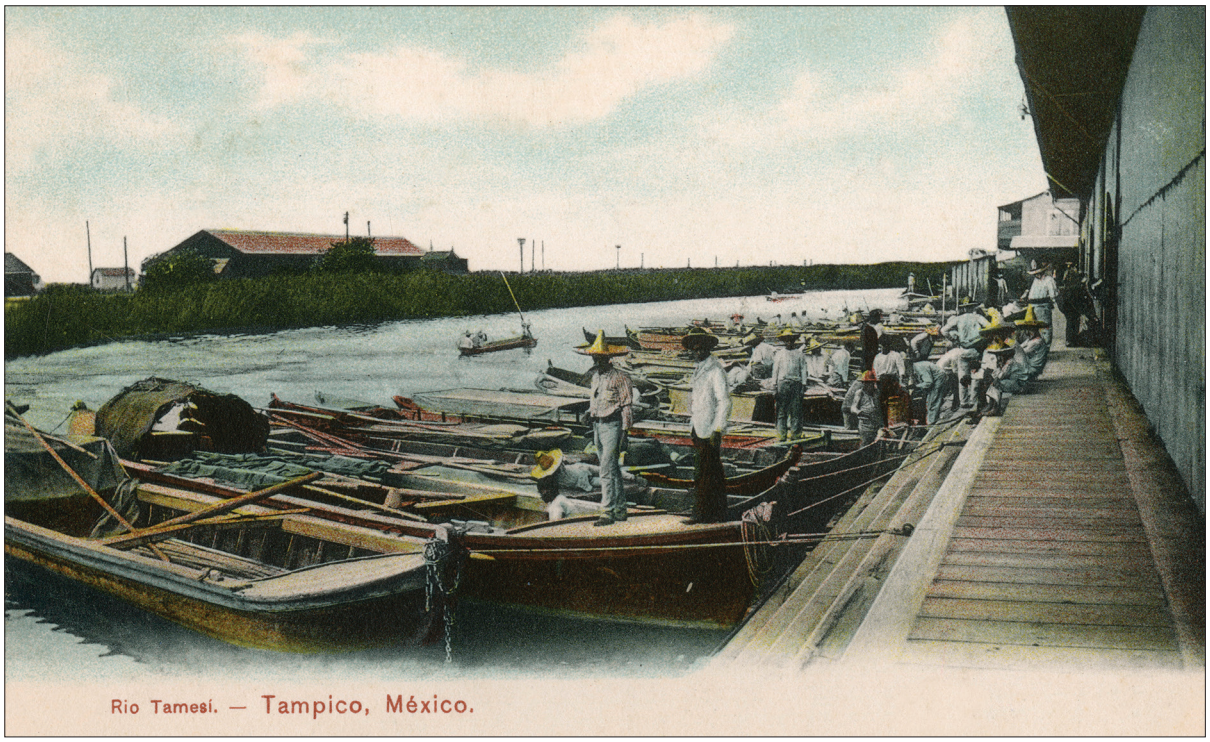
Democratic candidate Woodrow Wilson defeated Taft in the 1912 election. The election was highly unusual because former president Theodore Roosevelt also ran against Taft, his own party's sitting president, creating a split in the Republican vote. With the Republican vote divided between Taft and Roosevelt, Wilson was able to win with a clear electoral majority even though he received less than a majority of the popular vote—around 42 percent.

Wilson, like many presidents before him, wanted to spread American values around the world. He rejected both Roosevelt's "big stick" policy and Taft's economics-based diplomacy. Instead, he set foreign policy goals that were based on his morality and ideals, an approach known as "moral diplomacy."

The Tampico Affair

Wilson soon put his policy of moral diplomacy to the test in Mexico. When he took office in 1913, Mexico was in the midst of a revolution. The country's new leader, Victoriano Huerta, a conservative general rather than a revolutionary, had taken power in a violent **coup**. Because Huerta had seized control through force, Wilson refused to recognize his government, addressing him as "General" rather than "President" in correspondence. Wilson believed that supporting democratic rule was a moral obligation of U.S. foreign policy.

When efforts to convince Huerta to hold free elections failed, Wilson imposed an arms embargo and positioned U.S. naval forces near Mexico. Tensions escalated in April 1914 after American sailors were briefly detained in the coastal city of Tampico by Mexican federal



Port cities like Tampico, Mexico, shown here, were frequent stops for U.S. military ships that needed to resupply. The Tampico affair, an incident on one such ship, became a symbol of tensions between the United States and Mexico.

troops loyal to General Huerta. Although they were quickly released and the Mexican government apologized, Wilson demanded a formal twenty-one-gun salute to the U.S. flag. Huerta refused unless the United States returned the gesture, something Wilson rejected, as he still refused to recognize Huerta's legitimacy.

To Wilson, the Tampico incident reflected the instability and disrespect that justified U.S. involvement. To many Mexicans, it was an act of foreign interference. These tensions laid the groundwork for deeper U.S. involvement in Mexico, including the military occupation of the city of Veracruz in 1914 and, later, the pursuit of revolutionary leader Pancho Villa after his attacks on American territory.

Think Twice

How did Wilson use moral diplomacy in Mexico, and what challenges did he face?

Occupation of Veracruz

Later in April 1914, a shipment of arms from Germany was scheduled to arrive at Veracruz. After the U.S. arms embargo, Huerta had looked to Germany for support

in the form of weapons and financial aid. Wilson ordered U.S. naval forces to seize the port to prevent the weapons from being delivered. He ordered American forces to, in his words, "take Veracruz at once." The military landed at the Veracruz port and occupied the city.

The American occupation of Veracruz lasted six months. As U.S. forces seized control of the city, they encountered strong resistance from Mexican soldiers, militia members, and civilians. The violence resulted in 19 American and 126 Mexican deaths.

As the occupation of Veracruz began, U.S. soldiers raised the American flag to show that the city was now under American control.

Meanwhile, the Mexican Revolution and opposition to Huerta continued. The U.S. occupation of Veracruz and the arms embargo weakened Huerta's grip on power. In July, he resigned and fled the country. The United States had initially agreed to withdraw from Mexico once Huerta was gone and a new government was in place. However, Wilson wanted American troops to stay until he reached an agreement with Mexico's new president, the rebel leader Venustiano Carranza. Wilson supported Carranza because he saw him as a more legitimate and democratic alternative to Huerta, in line with Wilson's own policy of moral diplomacy. Under moral diplomacy, Wilson aimed to support governments that reflected democratic values rather than those that seized power by force. Wilson wanted Carranza to promise not to retaliate against Mexicans who had worked for the U.S. military. Carranza, on the other hand, did not want the United States making decisions for Mexico. In November, Carranza agreed to Wilson's conditions, and the two countries negotiated an agreement. Although the occupation ended peacefully, it deepened mistrust between the two countries.

Think Twice

How did presidents of the early 1900s shape foreign policy in the twentieth century?

Hunting Pancho Villa

In 1915, the United States publicly recognized Carranza as the president of Mexico. However, Carranza still had internal rivals who were fighting for control of the Mexican government. One of them was the Mexican revolutionary Francisco "Pancho" Villa, a former ally of Carranza's in the fight against Huerta. The two had fallen out, and Villa's forces fought Carranza's for control of Mexico beginning in late 1914. Villa was defeated in several battles by Carranza's forces.

Frustrated by U.S. recognition of Carranza and reeling from Carranza's victories against him, Villa fled to northern Mexico, where he aimed to demonstrate through attacks that Carranza did not truly control this region. Some historians argue that Villa hoped to provoke a U.S. military response against Carranza's government. Others emphasize Villa's desire for revenge against the United States, which he believed had betrayed him after previously offering support.

Villa and his forces embarked on a series of raids in northern Mexico and across the U.S. border. In January 1916, Villa's forces killed seventeen U.S. citizens in Santa Isabel, Chihuahua. Later, when Villa's army needed to resupply after a series of losses, he led them across the border to the small U.S. town of Columbus, New Mexico, which had a military station and a few hundred civilian residents.

On March 9, 1916, Villa's troops raided the town and set it on fire, shouting, "*Viva Villa! Viva México!*" ("Long live Villa! Long live Mexico!") At least seventeen Americans and more than one hundred Mexicans died in the ensuing battle.

These actions made Villa an instant enemy of the United States. President Wilson sent a military expedition, led by General John J. Pershing, to Mexico to find and capture Villa. The expedition lasted eleven months, and Pershing's forces covered hundreds of miles seeking Villa. However, the soldiers never succeeded. Most Mexicans were hostile to American forces and did not want to help them. Carranza and his government also opposed the expedition. Villa knew the terrain of northern Mexico well enough to avoid capture. In 1917, Wilson decided Villa was no longer a threat and called off the search. According to U.S. secretary of war Newton Baker, the expedition's real purpose had been to project military power across the border and to show Mexican leaders that the United States would not hesitate to act.

The expedition had another impact on the U.S. military. Members of Pershing's mission used new technologies and equipment, such as motorized transport and airplanes, to search Mexico's desert and mountains. These technologies would play a major role in World War I (1914–18), known at the time

After Pancho Villa's raid on Columbus, New Mexico, "Wanted" and "Reward" posters appeared in northern Mexico, offering incentives for any information that might lead to his capture.

as the Great War. Additionally, Pershing's experience in Mexico helped prepare him as a leader for larger-scale warfare; when the United States entered the war in 1917, he was chosen to lead the American Expeditionary Force to Europe. Meanwhile, tensions between the United States and Mexico remained high. These tensions would soon take on new significance as global conflict unfolded.

Think Twice

How did events from 1915 to 1917 affect the relationship between the United States and Mexico?

Topic 2
World War I

Framing Question

What were the effects of U.S. involvement in World War I?

The May 7, 1915, sinking of the *Lusitania* by a German U-boat helped turn U.S. public opinion against Germany during World War I.

The United States Enters a Global Conflict

Setting the Scene

On April 2, 1917, President Woodrow Wilson steps before an emergency session of Congress, his expression somber but resolute. For nearly three years, the Great War has devastated Europe. The United States has attempted to steer clear of the conflict, wary of being drawn into the violent affairs of distant empires. But now, Wilson believes, the war has reached America's doorstep.

German U-boats prowl the Atlantic, sinking vessels without warning. Both military and civilian ships have been targeted, including those from neutral nations. American civilians have died in these attacks. In early 1917, Germany escalated its campaign of unrestricted submarine warfare, sinking several American merchant ships in quick succession. For Wilson, this is not just a violation of international law; it is an affront to human decency. "Vessels of every kind . . . have been ruthlessly sent to the bottom," he tells Congress, "without warning and without thought of help or mercy for those on board." He confesses that he once doubted any government could abandon the principles of civilized nations so completely. But that doubt has now vanished. What he sees is not

simply a military strategy. It is, as he puts it, "warfare against mankind."

Then came the Zimmermann Telegram. In January 1917, British intelligence intercepted a secret communication from German foreign minister Arthur Zimmermann to his ambassador in Mexico. The message proposed a military agreement: If the United States enters the war, Germany will support Mexico in reclaiming lost territory in Texas, New Mexico, and Arizona. Japan was also floated as a possible ally. When the contents became known, Wilson was stunned. He convened his cabinet on March 20. One by one, his advisers have urged him to act. The threat is no longer distant.

Now, on April 2, Wilson addresses Congress and asks for a declaration of war against Germany. He frames the conflict in moral terms, not as a war for conquest, but as a fight to make the world "safe for democracy." Members of Congress debate the resolution. The Senate votes in favor on April 4. The House follows after a long and tense session, casting its votes around 3:00 a.m. on April 6. The final tally: 373 in favor, 50 opposed. The United States is at war.

Across the Atlantic, America's allies receive the news with relief. Britain and France have borne the weight of the Great War since 1914. Their armies are exhausted, their populations weary. In Russia, a revolution is already unraveling the Eastern Front. Allied leaders fear that Germany will soon shift its full military power to the west. They need reinforcements. Wilson's decision sends a powerful message: After years of ***neutrality****, the United States will no longer remain on the sidelines. Help is on the way.*

Causes of World War I

Why did some of the most powerful countries in Europe suddenly go to war against one another in a conflict so deadly, it became known as "the war to end all wars"? The roots of the conflict lay in decades of imperial competition, increasing **militarism**, nationalist tensions, and strategic rivalries that resulted in entangled **alliances**.

Industrial Power and Militarism

The Second Industrial Revolution, in the late 1800s and early 1900s, introduced innovations that transformed manufacturing, warfare, and global competition. The rise of German industry directly challenged Britain's economy, which had long dominated world markets. This industrial strength also allowed Germany to build up its military forces, particularly its navy. At the same time, militarism—the glorification of military strength and readiness—became deeply embedded in political culture, especially in Germany and Austria-Hungary. As technology advanced, so did the weapons of war: **artillery**, machine guns, submarines powered by diesel engines, and ships fueled by oil rather than coal. The scale and speed of killing would be unlike anything the world had ever seen.

Think Twice

How did competition grow in Europe before World War I?

The Naval Arms Race

The rivalry between Germany and Great Britain deepened in the years before the outbreak of war. Britain had long relied on naval dominance to protect its empire and trade routes, while Germany saw building a strong navy as essential to its growing power. Each new ship launched by one nation prompted the other to respond in kind, drawing both into an escalating competition. Germany invested heavily in new warships to challenge British naval supremacy but never surpassed the Royal Navy, which remained the largest and most powerful fleet in the world. This **arms race** strained relations between Germany and Britan and heightened British fears about protecting their global empire, symbolizing the larger atmosphere of suspicion and hostility spreading across Europe. The rapid buildup of weapons on land and at sea signaled that the major powers increasingly expected a future war.

Countries Form Alliances

The late nineteenth-century alliance system in Europe began to take shape after the Franco-Prussian War of 1870–71, when the

German states, led by Prussia, defeated France and unified into a powerful new German Empire. The war was a disaster for France. Its forces were decisively defeated, and Paris itself was besieged and captured. The war not only humiliated France—which lost the border region of Alsace-Lorraine, a valuable area rich in coal and iron—but also shifted the balance of power in Europe by placing a strong, united Germany at its center. The memory of this defeat and the loss of Alsace-Lorraine left France fearful that Germany might launch another invasion in the future. Meanwhile, German leaders were concerned about Russian influence in eastern Europe and sought allies to secure Germany's eastern and southern borders. In 1882, Germany, Austria-Hungary, and Italy signed the Triple Alliance, pledging mutual support in the event of an attack. A decade later, in 1892, France and Russia responded by forming a military alliance of their own, aimed at containing German power from both the west and the east. These rival alliances were designed to preserve peace by deterring conflict; the risk of facing not just one opponent but several allied powers was meant to discourage any nation from starting a war. However, the alliances also created a fragile balance in which a single dispute could trigger a chain reaction and pull many nations into a broader war. As alliances hardened, each country expanded its armies and stockpiled weapons, deepening the militarization of Europe.

In 1907, Britain, France, and Russia formed the Triple Entente. However, this was not a formal alliance. The countries were under no obligation to fight in defense of one another. Instead, the countries had a mutual understanding that they would maintain a friendly relationship and would, potentially, ally together in the case of war. France and Britain were both worried about Germany's growing military, and they desired more Russian support. Russia's massive population and vast geographic size made it a particularly valuable partner. Many European leaders believed that Russia's manpower could prove decisive in any future war, while its enormous territory promised to exhaust any enemy that tried to invade. Germany, on the other hand, saw the Triple Entente as adding to a growing circle of hostile countries around it. German military planners were especially anxious about Russia's expanding army and the speed with which it could mobilize. Both the Triple Alliance and the Triple Entente grew increasingly distrustful of the intentions of their rivals. This growing hostility and suspicion made it harder for countries with disputes to pursue diplomatic resolutions to their problems.

When war eventually broke out, these two alliances hardened into the opposing sides of the conflict: The Triple Alliance formed the backbone of the Central powers in

World War I, while the Triple Entente became the foundation of the Allied powers.

Think Twice

How did alliances both reflect the reasons nations sought protection and contribute to the start of World War I?

Imperialism, Colonialism, and Nationalism

When making alliances, European countries aimed to protect not only their territories in Europe but also their far-reaching overseas empires and colonies. Between 1870 and 1914, European imperialism expanded dramatically, with European powers claiming vast territories across Africa and Asia.

The competition for empire contributed directly to rising tensions between European nations. Colonies increased a country's wealth and global influence, and a nation with a large empire, like Britain, was widely viewed as a great power. Ambitious nations such as Germany and Italy sought to elevate their status by expanding their empires as well, fueling aggressive competition and diplomatic friction.

A regional power struggle in southeastern Europe also contributed to the tensions that would eventually spark World War I. In the nineteenth century, nationalistic desires to unite ethnic groups had inspired the formation of new nation-states like Germany and Italy and fueled independence movements among ethnic groups ruled by older empires.

Austria-Hungary, eager to maintain its influence in the region, formally annexed Bosnia and Herzegovina in 1908. Both territories had a large population of Slavs, particularly Bosnia. Their annexation angered neighboring Serbia, which had hoped to unite Slavic populations, especially those in Bosnia, into a greater Serbian state. Russia, seeing itself as the protector of Slavs, initially supported Serbia but ultimately backed down under pressure, leaving Serbia isolated and humiliated. Still, cultural and religious ties continued to link Russia and Serbia closely, and many Serbs

This cartoon depicts the European nations as greedy powers dividing the Congo, an area in central Africa with rich natural resources. Pictured are figures representing Russia (the bear on the left), Belgium's King Leopold II, and Germany's Kaiser Wilhelm.

saw Russia as a powerful friend they could rely on in the future. Resentment toward Austria-Hungary deepened.

A series of brief but violent wars in the Balkans, a region of southeastern Europe that included countries such as Serbia, Bulgaria, and Greece, further inflamed tensions. Serbia emerged stronger and more confident, having gained territory and influence. Radical nationalist groups formed in Serbia, calling for the unification of all southern Slavs, including those still under Austria-Hungary's rule. Austria-Hungary viewed this growing nationalism as a direct threat to its multiethnic empire and feared rebellion from its own Slavic populations. In this climate of nationalist fervor and regional hostility, a secret group of Serbian nationalists began plotting the assassination of Austria-Hungary's Archduke Franz Ferdinand.

Think Twice

How did imperial competition and nationalist movements create tensions and instability in Europe before World War I?

The Assassination of Archduke Franz Ferdinand

Archduke Franz Ferdinand was the heir to the throne of Austria-Hungary. With the emperor in poor health, Ferdinand was expected to take over leadership of the empire. As preparation for that role, he went on a tour of Bosnia, a region that was home to many Slavic peoples. His presence there was seen by many Serbians as a provocation, a signal that Austria-Hungary intended to fully dominate the Balkans and crush efforts at Slavic independence.

One influential Serbian nationalist group was called the Black Hand. The group used violence and terrorist methods to promote Serbian nationalism across the Balkans. A cell, or secret revolutionary group, of Black Hand members conspired to assassinate Austria-Hungary's Archduke Franz Ferdinand, and on June 28, 1914, he and his wife were killed while they were visiting Sarajevo, the capital of Bosnia. Though the

This painting captures the moment that Archduke Franz Ferdinand and his wife were shot by Black Hand member Gavrilo Princip, which sent shock waves across Europe.

assassination was the work of one radical group, Austria-Hungary accused the Serbian government of complicity and held the entire nation responsible.

Think Twice

How did nationalism result in the assassination of Archduke Franz Ferdinand and his wife?

The July Crisis and the Beginning of World War I, 1914

Over a period of five weeks in July and August 1914, Austria-Hungary's response to the assassination in Sarajevo escalated into a massive international conflict called the July crisis. The crisis pitted Europe's great powers against one another and launched them into World War I.

On July 23, weeks after the assassination, Austria-Hungary presented Serbia with an **ultimatum**. It demanded that Serbia suppress anti-Austrian messaging spread by the press and by Slavic nationalist groups, dissolve nationalist groups like the Black Hand, and allow Austro-Hungarian officials to participate in the investigation and trial of those responsible for the assassination. Serbia rejected the demand to allow Austro-Hungarian law enforcement to get involved in the Serbian assassination trials. This rejection triggered a declaration of war by Austria-Hungary on Serbia on July 28. Germany pledged full military support to Austria-Hungary, a decision that emboldened the empire to take aggressive action. Italy, the third member of the Triple Alliance, at first remained neutral. However, Italy wanted to take territory from the Austro-Hungarian Empire and would soon leave the alliance.

When Austria-Hungary threatened Serbia, Russia mobilized its army to defend its Slavic ally. The speed of Russia's response alarmed both Germany and Austria-Hungary. German leaders had assumed it would take weeks for Russia's massive army to mobilize and saw this as an act of aggression. They declared war on Russia on August 1. On August 3, Germany declared war on France, hoping to weaken France before it could come to Russia's aid. Britain committed to aid France after Germany's declaration of war, preparing its navy to protect the French coast from German attacks.

Germany's military leaders had developed the Schlieffen Plan, a strategy to quickly defeat France before turning their attention to Russia. To avoid fighting in two different areas at once, the plan called for a rapid invasion of France through neutral Belgium. On August 4, 1914, German troops marched into Belgium, an action that violated Belgium's neutrality. Britain, just across the English Channel, responded by declaring war on

The July Crisis and the Beginning of World War I, 1914

The assassination of Franz Ferdinand set in motion a chain of events that resulted in World War I, beginning in the summer of 1914.

Germany. With Britain's entry, World War I had officially begun.

Think Twice

How did the assassination of Archduke Franz Ferdinand set off the chain of events that led to World War I?

The Conflict Expands

The alliance structure quickly expanded as the war escalated. Germany and Austria-Hungary, joined by the Ottoman Empire and Bulgaria, became known as the Central powers. Their opponents, the Allied powers, began as France, Britain, and Russia but grew to include other nations. Japan joined early, hoping to gain territory in East Asia. Italy, which had been part of the Triple Alliance, switched sides in 1915 after Britain and France promised it land. The United States would eventually join in 1917, bringing major economic and military support to the Allies.

The war was fought on two main fronts. The Western Front formed a largely continuous line of trenches that stretched from the North Sea to the northern border of Switzerland, passing through Belgium and France. Germany's Schlieffen Plan failed due to strong Belgian resistance and the quick mobilization of French and British troops. What Germany hoped would be a quick victory turned into a long-drawn-out impasse.

The Eastern Front stretched across eastern Europe, including Poland, Ukraine, Lithuania, Austria-Hungary, and Russia. The Russians and Romanians fought the Austro-Hungarians

Central, Allied, and Neutral Powers in World War I

During World War I, other countries joined the "great powers" of Europe to fight on either the Central or Allied side. Many countries stayed neutral, refusing to take one side or the other. Although Belgium was officially a neutral country, it was invaded by Germany in August 1914 and occupied by German forces until the end of the war.

and Germans on this front. While battles there involved greater shifts in territory than on the Western Front, neither side achieved a decisive breakthrough.

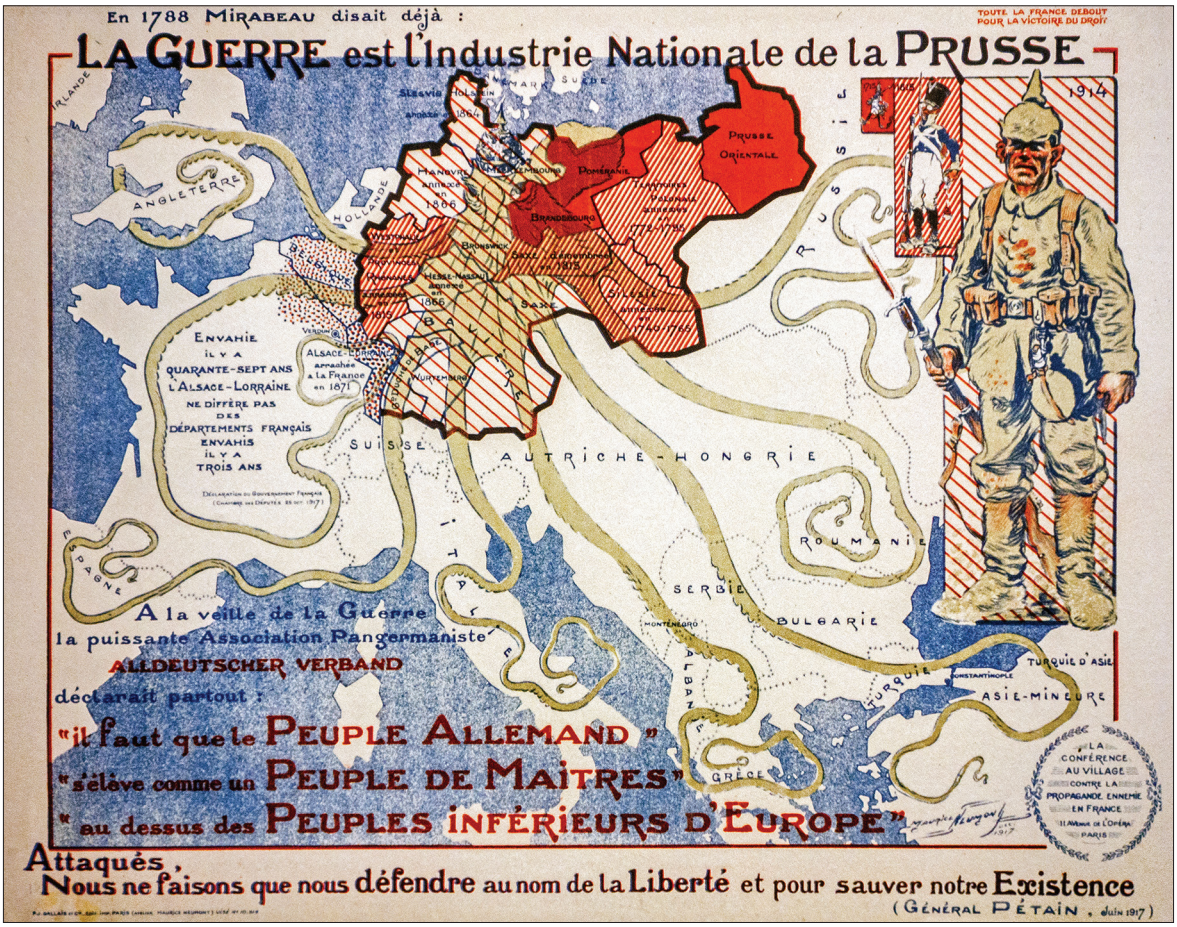
At first, the war saw rapid offensives and shifting lines, but the destructive power of modern weaponry quickly forced troops to dig defensive trenches and led to a yearslong stalemate. On the Western Front, the war bogged down into a brutal, grinding conflict of attrition—a strategy focused on wearing down the enemy through continuous losses in soldiers and resources—that lasted for years.

Think Twice

How did the conflict expand after World War I began?

Revolution in Russia

During World War I, anti-communist fears in the United States, which you will read more



This French poster shows Germany—called "Prusse" for a region of Germany that had once been a nation—as an octopus with tentacles taking over Europe. The poster suggests that Germany wants to take over the entire continent and that France needs to fight for its freedom and its continued existence.

about in Unit 4, were first stirred by the Russian Revolution of 1917. That year, Russia experienced two major political upheavals. In February, years of battlefield losses, food shortages, and economic hardship caused by the war triggered mass protests and mutinies. These pressures forced Czar Nicholas II to abdicate the throne, ending centuries of autocratic rule under the Romanov dynasty. A provisional government took power, but it chose to keep Russia in the war. This was an unpopular decision that further deepened the crisis.

In November 1917—late October according to the Julian calendar, which Russia still used at the time—widespread frustration with the war and the government's failure to address basic needs led to a second revolution. A radical socialist group called the Bolsheviks, led by Vladimir Lenin, overthrew the provisional government in what became known as the October Revolution. The Bolsheviks promised "peace, land, and bread," and one of their first actions was to withdraw Russia from World War I. In March 1918, they signed the Treaty of

Brest-Litovsk with the Central powers, formally ending Russia's involvement in the war. This allowed Germany to redirect troops from the Eastern Front to the Western Front and significantly affected the course of the conflict.

The Bolshevik takeover sparked a violent civil war between their new communist government and its opponents, including monarchists, liberals, and foreign-supported forces. In July 1918, the Bolsheviks executed Czar Nicholas II and his family. By the early 1920s, they had secured full control of the country. The Bolsheviks renamed themselves the Communist Party and laid the foundation for the future Soviet Union.

Though some Russians had initially welcomed the revolution, many became disillusioned by the violence, harsh policies, and lack of political freedom that followed. The Russian Revolution had been fueled by a range of political movements, from anarchists who rejected all forms of government to autocrats who favored strong central rule. Ultimately, the Bolsheviks, inspired by the ideas of Karl Marx, had emerged as the ruling force. Their rise to power during World War I and their decision to withdraw from the conflict would reshape both Russian society and the global political landscape.

Russia's sudden withdrawal also had political consequences. The fall of the Russian monarchy would give U.S. president Woodrow Wilson an opportunity to portray the war as a moral struggle between democracy and tyranny. Because the czar's government was an absolute monarchy, many Americans had questioned how the United States could fight on the side of a nation that did not practice democratic rule. With the czar no longer in power, the Allies could be presented as moving closer to democratic government, which allowed Wilson to argue more clearly that Germany and its allies represented tyranny. This shift made it easier for Wilson to claim that the United States was defending democracy on a global scale, a message that aligned with his policy of moral diplomacy.

Think Twice

How did the Russian Revolution affect Russia's role in World War I, and what opportunity did it provide U.S. president Woodrow Wilson?

In the Trenches

Soldiers in World War I spent much of their time in trenches—long, narrow ditches dug into the ground to provide protection and strategic positioning. The trenches on the Western Front stretched almost five hundred miles (805 km) from northeastern France to Switzerland. Crossing open ground was extremely dangerous, and trenches offered crucial, though limited, protection from enemy fire. Trenches were reinforced with barbed wire, which was used to slow down or trap advancing enemy soldiers.

Trenches were long but narrow, with little room to move. Soldiers were packed close together when they fought battles. They spent weeks at a time living in the trenches, even during periods when they were not fighting.

Trench warfare developed out of necessity because new weapons gave defenders a major advantage. Barbed wire, machine guns, and heavy artillery made it nearly impossible for attacking soldiers to cross open ground without being gunned down. With no cover, waves of troops were easy targets for machine-gun nests and artillery fire. Machine guns, which were extremely heavy and had to be set up in fixed positions, were especially effective for defense.

Despite the protection of trenches, soldiers remained under near-constant bombardment from machine-gun fire and long-range artillery. Millions of artillery shells could be fired in a single battle, exploding with great force and blowing massive holes in the ground in addition to killing or wounding soldiers. Because artillery was fired from miles away, soldiers could not easily take cover or avoid it unless they were in a secure trench. Loud blasts, the force of the explosions, and the uncertainty about when the next attack would strike caused constant anxiety for those under artillery fire.

The trench environment was full of dirt that often dampened into mud. Soldiers dug deep in the soil to escape bombardment. Standing or sitting for hours in mud often deadened the tissue in their feet, leading to a painful condition called *trench foot*. With soldiers in close quarters, lice infestations and contagious diseases spread rapidly. And with the constant noise and threat of death, soldiers got little sleep.

The area between the opposing trench lines was known as *no-man's-land*. As the name suggests, few soldiers entered no-man's-land, as it was exposed to enemy gunfire, snipers, and shelling. Retrieving the dead and wounded from no-man's-land was risky, and the area often became littered with corpses.

Fighting in dangerous conditions under constant threat of death caused many soldiers

to develop psychological trauma. At the time, the **trauma** was called "shell shock," named after the constant explosion of artillery shells during a battle. Today, "shell shock" is commonly known as a form of post-traumatic stress disorder (PTSD) and better understood, but during World War I, this type of trauma was less familiar to the public.

Think Twice

Why and how did trench warfare develop?

New Technologies Change Warfare

World War I was the first war to be fought on land, at sea, and in the air, with machines that reflected the new industrial potential of the twentieth century. Many of the weapons used in the war, such as machine guns, armored vehicles, and aerial bombs, had already been tested on a smaller scale by European powers in brutal colonial campaigns, particularly in Africa. Adding to soldiers' trauma was the large-scale exposure to the horrors wrought by these new industrial-age weapons.

As you have read, World War I–era machine guns and rapid-fire artillery were even more lethal than the weapons used only a few decades earlier. Artillery alone caused more deaths in the war than any other weapon, and machine guns were able to fire more than five hundred rounds per minute from a distance. World War I saw the first use of grenades and flamethrowers on the battlefield as well.

Chemical weapons were one of the earliest major new technologies used in World War I, and exposure to them could inflict extreme harm on soldiers. Poison gas was first introduced by the Germans in 1915 and was soon used by both sides. Different types of gas, including chlorine, phosgene, and mustard gas, were developed to cause panic, injury, or death. Even small exposures could disable soldiers by burning their lungs or eyes, and mustard gas could cause long-term blistering and blindness. The fear of gas attacks was intense and constant, and the effects could be psychologically traumatic. Gas often lingered in low-lying areas, forming dangerous chemical puddles in trenches and shell craters. In response, gas masks were quickly developed in 1915 and became standard equipment for soldiers on both sides.

Tanks, or large armored land vehicles, were first introduced by the British in 1916. They were specifically designed to cross trenches and provide armored protection for advancing troops, helping break the stalemate of trench warfare. Early tanks were long and heavy so they could roll over wide trenches and resist machine-gun fire. Even just the sight of a tank could be psychologically intimidating to enemy troops.

Soldiers were also vulnerable to observation and surveillance from above. Airplanes

were used primarily for reconnaissance—flying over enemy territory to gather information and take photographs of trench systems and troop movements. This aerial intelligence helped commanders plan attacks and track enemy activity. Airborne weapons would become more common later, but aircraft in the early years of the war were not yet heavily armed or used for large-scale bombing.

One of the clearest examples of the devastation caused by new weapons came during the Battle of the Somme in 1916. The battle lasted more than four months, from July to November. In that time, more than a million soldiers were killed or wounded, many by machine guns and artillery fire. The Somme revealed just how deadly and entrenched the conflict had become nearly a year before American troops arrived.

Think Twice

What were the major military and technological innovations during World War I, and how did they affect the war?

The United States: From Neutrality to War

In 1914, when news of the war spread across the Atlantic, President Wilson announced that the United States would remain "impartial in thought as well as in action" and not get involved. The United States had a history of avoiding European conflicts. In 1914, when the war began, many Americans supported this policy of **isolationism**.

In keeping with the United States' claim of political neutrality, American companies sent aid to both the Central powers and the Allied powers. Because a British naval blockade restricted shipments to the Central powers, however, most financial and material aid went to the Allies. In addition, American businesses and banks had strong economic ties to Britain and France, and many saw support for the Allies as a way to protect U.S. investments and ensure repayment of loans. From 1914 to 1917, the United States sent money and supplies primarily to the Allied powers. Factories shipped weapons and equipment, and U.S. banks lent millions of dollars. These exports to Europe strongly benefited the U.S. economy.

The Sinking of the *Lusitania*

As the war progressed in Europe, U.S. leaders grew concerned about German naval power. Both Britain and Germany blockaded each other's ports, but Germany escalated in early 1915 by using submarines called U-boats to

New York American

LUSITANIA DEAD 1,256---115 AMERICANS
GERMANY OFFICIALLY ADMITS SINKING SHIP

The 1915 sinking of the *Lusitania* was front-page news in the United States.

German U-boats were heavily armed and could move almost undetected through the oceans. Germany's use of submarines to attack any ships—even ships on peaceful missions—alarmed the Allied powers and the United States.

attack ships near Britain, including merchant vessels and those from neutral countries. The German strategy of unrestricted submarine warfare allowed submarines to strike without warning or regard for civilian safety, and it had shocking consequences.

On May 7, 1915, the British cruise ship *Lusitania* was carrying passengers from New York to England when it was torpedoed by a German U-boat. More than a thousand people were killed, including 128 Americans. Many Americans were outraged. The tragedy, and the deaths of those on board, largely turned U.S. public opinion against Germany.

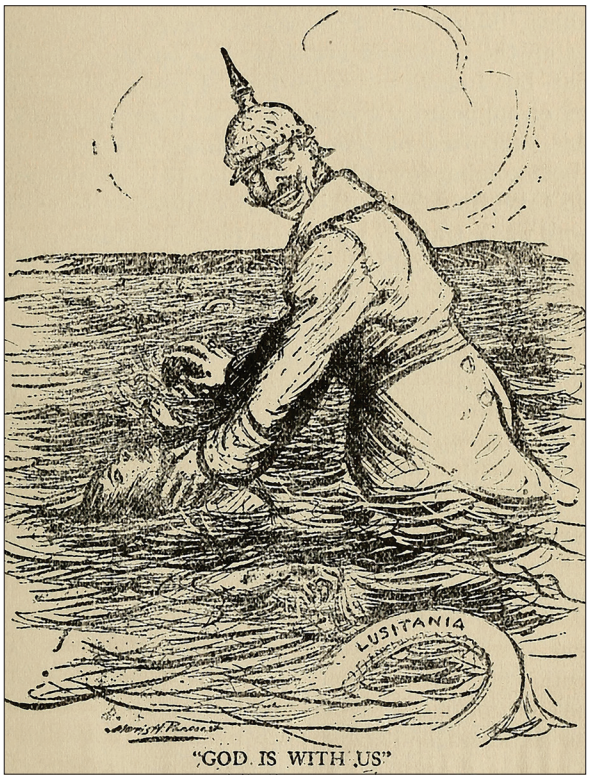
Wilson responded by warning Germany to stop attacks against unarmed merchant ships. In May 1916, Germany made what became known as the Sussex pledge, promising to halt unrestricted submarine warfare and to avoid targeting nonmilitary ships.

Think Twice

How did Germany's use of unrestricted submarine warfare in 1915–16 strain U.S.–German relations and affect American public opinion?

A Divided American Public

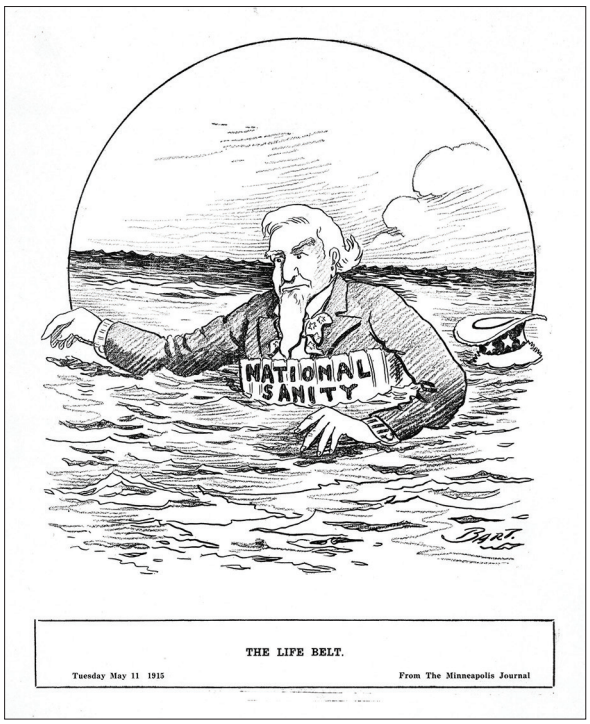
Even after the attack on the *Lusitania*, many Americans supported U.S. neutrality, including President Wilson. In particular, German Americans feared they would face discrimination or suspicion if the United States went to war against Germany.



Many pro-war Americans thought the sinking of the *Lusitania* was a sign the United States needed to act to save itself and the world from the German threat. In this political cartoon, Germany's Kaiser Wilhelm II is shown drowning someone in the ocean while a life preserver labeled "Lusitania" floats nearby.

Other Americans opposed sending U.S. troops to fight a foreign war, or any war at all. The anti-war song "I Didn't Raise My Boy to Be a Soldier" became popular in 1915. Members of the Progressive Party, which you learned about in the previous unit, worried that going to war would distract the nation from social reforms at home. When Wilson won reelection in 1916, many of his supporters used the slogan "He kept us out of war."

However, not everyone favored staying out of the conflict. Some Americans believed that the United States should begin preparing its military to defend the country against the Central powers. Theodore Roosevelt, who supported U.S. involvement, criticized Wilson's neutrality by saying that if Lincoln had acted the same way, "the North would have been saying they were so glad he kept them out of the war."



According to many anti-war Americans, the United States would be acting foolishly and self-destructively by entering the war. This cartoon shows Uncle Sam kept from drowning by a life preserver labeled "National Sanity"—implying "national sanity" was keeping the United States from involvement.

Think Twice

Why did some Americans believe the United States should stay out of the war?

The Zimmermann Telegram

Events in early 1917 pushed U.S. public and government opinion toward involvement in the war. At the beginning of the year, the heads of the German navy convinced the country's leaders that Britain and the Allies were vulnerable. They claimed they could end the war within five months by resuming unrestricted submarine warfare to starve Britain of food and supplies. Germany did just this in February 1917, breaking the Sussex pledge. In response, Wilson broke off diplomatic relations with Germany. He had long tried to keep the United States neutral and worried that he did not yet have enough public support to declare war, especially without clear evidence that Germany was attacking American ships. However, Germany's continued submarine campaign convinced him that conflict might be unavoidable, and he began arming U.S. ships in preparation.

Later in February, the British shared a telegram with the United States that their cryptographers, or code breakers, had intercepted before it reached its destination. This telegram was sent by Germany's foreign minister, Arthur Zimmermann, to the German ambassador in Mexico, Heinrich von Eckhardt. After describing Germany's plans to resume unrestricted submarine warfare, Zimmermann invited Mexico to join the German alliance if the United States declared war on Germany. He said that Germany would help Mexico regain the territories it had lost to independence movements and to the United States after the Mexican-American War (1846–48), including Texas, New Mexico, and Arizona. Germany believed this proposal might succeed because U.S. relations with Mexico were already strained. As you have read, just a year earlier, U.S. troops had entered Mexico in pursuit of Pancho Villa, and tensions remained high. Britain hoped the telegram's threat would convince the United States to join the war on their side.

News of the Zimmermann Telegram broke to the public on March 1, shocking and angering many Americans. Wilson believed the telegram was evidence that Germany "means to stir up enemies against us at our

PRIMARY SOURCE: ZIMMERMANN TELEGRAM, ARTHUR ZIMMERMANN, 1917

FROM 2nd from London # 5747.

We intend to begin on the first of February unrestricted submarine warfare. We shall endeavor in spite of this to keep the United States of America neutral. In the event of this not succeeding, we make Mexico a proposal or alliance on the following basis: make war together, make peace together, generous financial support and an understanding on our part that Mexico is to reconquer the lost territory in Texas, New Mexico, and Arizona. The settlement in detail is left to you. You will inform the President of the above most secretly as soon as the outbreak of war with the United States of America is certain and add the suggestion that he should, on his own initiative, invite Japan to immediate adherence and at the same time mediate between Japan and ourselves. Please call the President's attention to the fact that the ruthless employment of our submarines now offers the prospect of compelling England in a few months to make peace.

Signed, ZIMMERMANN.

Source: "Zimmermann Telegram (1917)." Milestone Documents. National Archives. https://www.archives.gov/milestone-documents/zimmermann-telegram.

very doors." On March 20, Wilson discussed entering the war with his cabinet. Then, on April 1, Germany sank the American ship *Aztec*. Days later, Congress declared war on Germany.

Think Twice

How did the Zimmermann Telegram help lead the United States into World War I?

Mobilization: Preparing the Country

Now that the United States was at war, the public mood turned toward patriotism and support for the war effort. A new song called "Over There" became popular. Written by George M. Cohan soon after the 1917 war declaration, the song took the point of view of U.S. soldiers eager to join the Allied cause: "The Yanks [Americans] are coming . . . / Send the word, send the word to beware / We'll be over we're coming over / And we won't come back till it's over over there." The Great War, as it was called at the time, was the first time U.S. soldiers had been sent abroad to fight in a major European conflict. And it was the United States' first large-scale military deployment (movement of soldiers and military equipment) across the Atlantic Ocean to Europe. War participation was a daunting challenge that would require the United States to reshape its economy and change social and political aspects of American life.

Building and Training the Army

The first step of **mobilization** was to create a U.S. military force large enough to provide the support the Allies needed. At the outset of the war, the United States had around 127,000 soldiers in its standing army, most of whom lacked training for large-scale trench warfare. By comparison, Britain, Germany, Russia, and Austria-Hungary had already mobilized millions of soldiers, many of whom had been fighting for years. After visiting France in 1917, U.S. general John Pershing reported that the United States, in his opinion, would need about three million troops to make a meaningful contribution to the Allied war effort. In addition to soldiers, the country would need uniforms, weapons, barracks, and training equipment, as well as transportation to send the soldiers and their supplies to the Western Front. All of those supplies and troops would have to be carried by ship across the Atlantic. To protect these transport efforts, the United States and its allies organized ships into convoys, or groups of vessels that traveled together, for safety from German submarines. Congress appropriated $3 billion for the enormous task of building the military—a staggering amount at the time, especially considering that in 1917, federal tax revenue was less than $1 billion before wartime tax increases.

Think Twice

What challenges did the United States face in mobilizing its military for World War I?

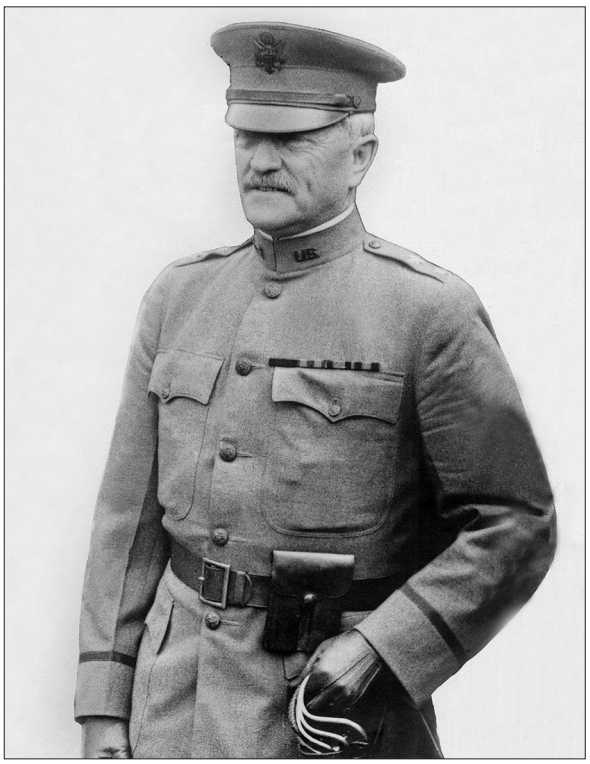
The Selective Service Act

While many men had volunteered to serve in the army, it wasn't nearly the three million Pershing said were necessary. Wilson instituted a policy of conscription to supplement the volunteers. On May 18, 1917, Wilson signed the Selective Service Act, which required all male U.S. citizens between the ages of twenty-one and thirty to register for military service. Wilson argued that this form of enlistment was the most democratic way to build the army because it would choose people at random. Millions of men registered within the first few months, drastically increasing the army's size. In August 1918, the act was expanded to cover men between the ages of eighteen and forty-five. Overall, about 2.8 million American men were drafted to serve in World War I.

General Pershing and the Doughboys

The U.S. force deployed to fight in Europe during World War I was known as the American Expeditionary Force (AEF). With General Pershing as its commander, the AEF eventually included more than two million American troops who served overseas, part of a total U.S. wartime force of more than four million soldiers. Although the United States declared war in April 1917 and the first soldiers were sent over in June, more than

This iconic poster from 1917 encouraged young American men to join the United States Army.

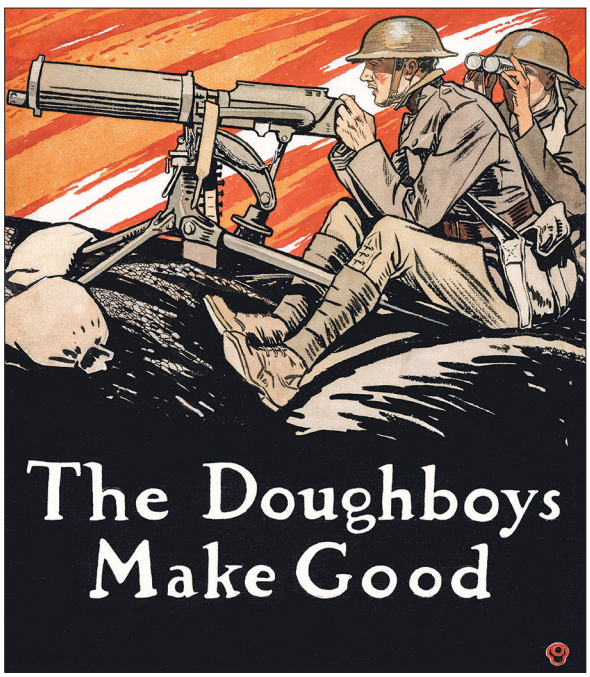


General John Pershing commanded an army of millions of Americans to fight in World War I.

a year of preparation was needed before large numbers of American troops arrived in Europe in mid-1918.

Following the Selective Service Act, newly drafted troops had begun preparing by the summer of 1917 in training camps across the United States. The camps were built very quickly and at first lacked the necessary supplies. Many soldiers trained with wooden rifles before real rifles arrived. Pershing also had some training centers built in France, where U.S. soldiers could continue training for combat once they arrived in Europe.

Soldiers of the AEF were also widely known by the nickname "Doughboys." According to one popular theory, the name came from foot soldiers who traveled through Mexico to capture Mexican rebel leader Pancho Villa, which you learned about in the previous topic. After walking through dusty Mexican terrain, the soldiers became covered with white adobe dust. They were called "adobes," which was shortened to "dobies." The dust also made them look like they were covered in flour, which is used to make dough.



Images like this appealed to a shared American pride in the Doughboys and helped make the nickname popular.

Think Twice

How did the United States build a military force to fight in Europe?

Paying for the War

Organizing and preparing for war also required sweeping economic changes in the United States. Federal government agencies took on a larger role in the economy to ensure that the country could supply war materials and equip its soldiers. The War Industries Board (WIB) was created to oversee the nation's industrial production. Although the WIB lacked legal authority to fix prices, it influenced economic behavior by setting national priorities, distributing supplies, and pressuring businesses to follow its recommendations—often through appeals to patriotism and public duty.

Another key agency was the National War Labor Board (NWLB), which aimed to prevent labor disputes from disrupting wartime production. Like the WIB, it lacked legal enforcement power but proved effective

To finance the supplies and equipment the United States needed for the war, Americans were encouraged to buy Liberty bonds from the government. Posters like this one appealed to Americans' desire to do their part to help. Bond buyers received a "badge of honor" to wear.

by mediating conflicts and encouraging industries to recognize workers' right to collective bargaining. The NWLB helped secure better wages and working conditions in exchange for no-strike pledges during the war.

Factory production across the country shifted to focus on war weapons and materials, such as gunpowder, ammunition, and airplane engines. Because U.S. factories had already been producing military goods for European allies, production could be quickly expanded to meet American military needs, though not without logistical challenges.

Despite increased production, more money was still needed to fund the war. In addition to raising taxes, Secretary of the Treasury William McAdoo decided on a "Liberty loan" plan in which the government would borrow money from the American public through war bonds. Individuals purchased these bonds, called Liberty bonds, for varied amounts of money. When the war ended, the government would repay the money with interest. Buying Liberty bonds was seen as a display of patriotism, and the government used posters and other forms of media to urge people to purchase bonds. The Liberty loan plan raised $17 billion.

Think Twice

How did World War I change the U.S. economy?

Fighting Overseas in the Great War

In the summer of 1917, the first American troops arrived in France, though they would not join the fighting at the Western Front until 1918. The delay was due to the time needed to train U.S. soldiers, organize transportation across the Atlantic, and build up military infrastructure in Europe. General Pershing also insisted that American forces fight under U.S. command, rather than being absorbed into British and French units, which required additional planning and coordination. The French were glad to see the American soldiers; with the Doughboys' help, the Allies might have a chance of winning the war. French troops greeted the Americans with shouts of "*Vive l'Amérique!*" ("Long live America!")

While many members of the U.S. Army shared the French troops' enthusiasm, many were also inexperienced and unprepared for the violence and destruction of the war. This war, in particular, was the largest the world had yet seen. More than thirty nations were drawn into the war, including many colonies whose people and resources were mobilized by European powers without their consent; more than sixty million people fought in World War I. For many young recruits who had never seen battle, the trench warfare, constant shelling, and widespread death left lasting emotional and psychological scars. The arrival of fresh American troops on the Western Front added new energy and manpower to the exhausted Allied forces, but the brutal conditions still took a toll on all who served.

The Battle of Cantigny

While the **infantry** soldiers of the AEF may not have been fully aware of the battlefield's dangers in May 1918, they knew they needed to prove themselves to the French and British. The Battle of Cantigny (/can*tee*nee/), which lasted from May 28 to May 31, was their first chance. It was the first U.S. **offensive** of the war.

The goal was to capture Cantigny, France, a village held by the Germans. The AEF's First Infantry Division, some of the first U.S. troops sent to Europe, led the offensive. The AEF secured the village fairly quickly and spent most of the battle repelling German attacks. Despite heavy shelling and repeated counterattacks, the AEF held its ground and secured its first battlefield victory. The First Infantry Division, known as the "Big Red One" because of the red number 1 patches on their shoulders, suffered more than a thousand casualties at Cantigny but went on to fight in many other major battles, earning respect for their dedication. The AEF's success at Cantigny

This illustrated map shows the locations and movements of the AEF in France on the Western Front.

Flamethrowers, weapons that release burning fuel, were another technology used on battlefields along the Western Front. This image shows French troops equipped with flamethrowers at the Battle of Cantigny.

proved it could operate independently and boosted Allied morale at a critical moment in the war.

Think Twice

Why was the Battle of Cantigny important for the American Expeditionary Force?

The Battles of Château-Thierry and Belleau Wood

In the spring of 1918, the Germans launched a major offensive on the Western Front, hoping to win the war before more American troops arrived. German troops advanced on the French town of Château-Thierry (/sha*toe/tee*air*ee/) near the Marne River. In late May, German forces broke through French defenses near Château-Thierry and moved within striking distance of Paris.

American troops crossed the Marne to defend Château-Thierry. They fought on the banks of the river until July. Despite being outnumbered, American troops held their ground and helped push German forces back from the town. The AEF's Third Infantry Division was nicknamed the "Rock of the Marne."

PRIMARY SOURCE: U.S. SECRETARY OF THE NAVY ON BELLEAU WOOD, JOSEPHUS DANIELS, 1919

Josephus Daniels, who served as secretary of the navy during President Woodrow Wilson's administration, recounted the events of the Battle of Belleau Wood—a fierce and pivotal clash that unfolded near France's Marne River in June 1918. Lasting nearly a month, the battle marked a significant moment in World War I, showcasing the determination and strength of American forces as they helped halt the German advance.

At 5 o'clock the attack came. . . .

The Marines fought strictly according to American methods—a rush, a halt, a rush again, in four-wave formation, the rear waves taking over the work of those who had fallen before them, passing over the bodies of their dead comrades and plunging ahead until they, too, should be torn to bits. But behind those waves were more waves, and the attack went on.

"Men fell like flies"; the expression is that of an officer writing from the field. Companies that had entered the battle 250 strong dwindled to 50 and 60 . . . ; but the attack did not falter. . . .

In Belleau Wood the fighting had been literally from tree to tree, stronghold to stronghold; and it was a fight which must last for weeks before its accomplishment in victory.

Belleau Wood was a jungle, its very rocky formation forming a German machine-gun nest, almost impossible to reach by artillery or grenade fire.

There was only one way to wipe out these nests—by the bayonet. And by this method were they wiped out, for United States Marines, bare chested, shouting their battle cry of "E-e-e-e-e y-a-a-h-h-h yip!" charged straight into the murderous fire from those guns, and won!

Out of the number that charged, in more than one instance, only one would reach the stronghold. . . .

In all the history of the Marine Corps there is no such battle as that one in Belleau Wood. Fighting day and night without relief, without sleep, often without water, and for days without hot rations, the Marines met and defeated the best divisions that Germany could throw into the line.

Source: Daniels, Josephus. "Secretary Daniels' Story." In *Americans Defending Democracy: Our Soldiers' Own Stories.* 2nd ed. New York: World's War Stories, 1919, pp. 36–37.

Like many battles in World War I, the Battle of Château-Thierry destroyed towns along the Western Front. Here, French people walk through the ruins of their town in 1918.

Meanwhile, other soldiers from the U.S. Army and Marine Corps pushed back the German offensive by defending the French hunting preserve of Belleau Wood. The forest's location made it a key position: If Germany captured it, they would have a clear path toward Paris. The Battle of Belleau Wood, which raged through June 1918, included the deadliest single day in Marine Corps history: June 6, when hundreds of Marines were killed and many more wounded. The Americans ultimately secured Belleau Wood for the Allies, further proving their value to the British and the French.

Think Twice

How did U.S. soldiers keep the Germans from reaching Paris?

The Battles of Meuse–Argonne: A Turning Point

By late 1918, both the Allied and Central powers had suffered enormous losses. Each side's goal was no longer to gain territory but to outlast its opponent. The war continued as a war of attrition, where the first side that could no longer continue fighting would lose.

Hoping to wear down the Germans, the Allies launched the Hundred Days Offensive. As part of this larger campaign, the AEF prepared for its own massive assault, known as the Meuse–Argonne Offensive. It lasted for less than one hundred days, from September 26 to November 11, but was still one of the longest offensives the

African American Soldiers and the Harlem Hellfighters

During World War I, racial segregation was official policy in the U.S. military. African American soldiers enlisted and were sent overseas, but they were typically assigned to segregated noncombat labor units rather than frontline combat roles. They often handled supplies and equipment for the AEF or worked on war-related construction projects, such as building trenches, because military leaders wrongly deemed them unfit for combat service.

Some African American units, however, did fight on the front. The most famous was the 369th Infantry Regiment, a National Guard unit from New York, which had spent time organizing and training in the predominately Black New York City neighborhood of Harlem. When the regiment arrived in St. Nazaire, France, in December 1917, it was assigned to unload supply boats, lay railroad tracks, and perform other tasks. The soldiers were unhappy with being sidelined—they had come to fight in the war, not do manual labor.

Unit commander William Hayward later appealed to Pershing to put the troops in combat. The 369th Infantry Regiment was well-known for its regimental band, which toured France and performed jazz music as the rest of the regiment worked. The band was later credited with introducing jazz to France and Europe. The musicians' fame helped convince Pershing to let the soldiers fight, and they joined France's Sixteenth Infantry Division. French units included many soldiers of color from countries under French colonial control. As a result, French soldiers were accustomed to racially diverse troops, allowing the new regiment to fit in relatively easily.

The soldiers of the 369th quickly earned respect for their formidable skill on the battlefield. Their toughness inspired German troops to give them the nickname "Harlem Hellfighters." The Hellfighters fought in the Battles of Château-Thierry, Meuse–Argonne, and others, spending 191 days in combat at Meuse–Argonne—longer than any other U.S. unit. The unit as a whole, along with 171 individual members, later earned the French Croix de Guerre (krwah/duh/gair/), or War Cross, medal for their service, which was France's highest award for military bravery. Those 171 members also received France's highest distinction, the Legion of Honor, for their heroism.

U.S. troops had fought. The Americans advanced through France's thick Argonne Forest to the Meuse (/myooz/) River, covering nearly forty miles (64 km). In October, they broke through Germany's Hindenburg Line, a heavily fortified system of defenses along the Western Front. In November, they reached the railway town of Sedan, France, and cut off German railway communications.

American troops brought tanks to the Argonne Forest to defeat the Germans in an offensive attack. The Battles of Meuse–Argonne helped tip the war's outcome in the Allies' favor.

One American soldier who showed exceptional courage was Sergeant Alvin York. In October 1918, during the Meuse–Argonne Offensive, his unit ended up behind German lines and came under heavy machine-gun fire, which killed or wounded many of his soldiers. York took command of the survivors, and while others provided support, he advanced and silenced several German machine-gun nests with his own rifle and pistol fire. The group forced the surrender of more than a hundred German soldiers. York was promoted and later received a Medal of Honor for his bravery.

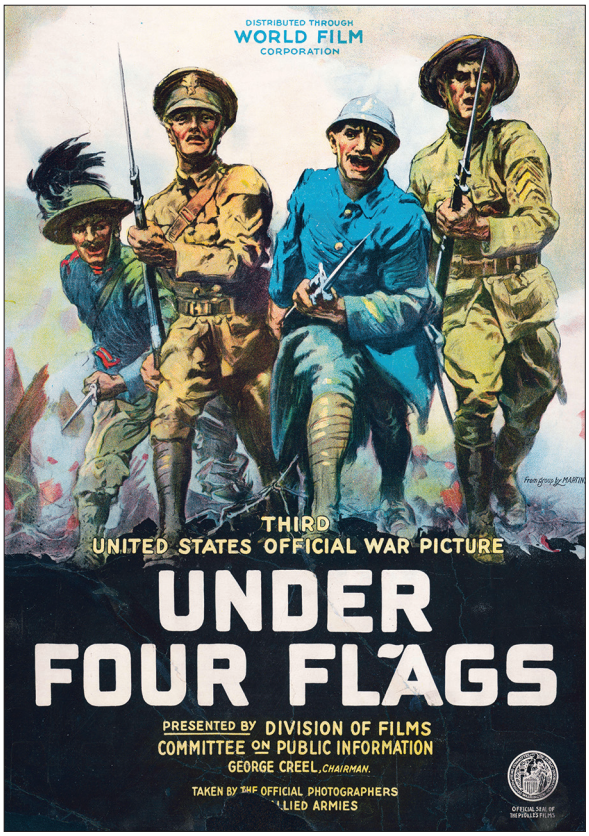
The Battles of Meuse–Argonne resulted in more than one hundred thousand American casualties. Despite these losses, it was a turning point in the war and helped lead to an Allied victory. As you will soon read, because Germany was facing collapse, its leaders agreed to an **armistice** in November, ending the war before any final German offensive could be attempted.

Think Twice

What were the major battles of World War I, and what role did the United States play in these battles?

The Home Front

As the war was still raging, President Wilson aimed to convince Americans that U.S. participation in World War I was a defense of freedom and liberty. To do so, he needed to



The Committee on Public Information produced "official war films" that celebrated the U.S. war effort. The film *Under Four Flags*, a documentary about U.S. and Allied leaders and troops, was released in 1918.

use new public relations methods. In April 1917, Wilson created a federal committee, the Committee on Public Information (CPI), to spread pro-war messages. The U.S. government prepared to use **propaganda** as another tool to win the war.

The CPI was led by former journalist and muckraker George Creel. (Recall from Unit 2 that muckrakers were journalists who reported on corruption and advocated for reform.) Its members included writers, artists, and people who worked in advertising. They shared pro-war information throughout the U.S. media, in newspaper columns, ads, pamphlets, posters, and newsreels, or short films that played before movies. They trained thousands of speakers, known as "Four-Minute Men," to deliver short speeches in schools, movie theaters, and other public places that explained Wilson's war goals. Celebrity campaigns and billboards encouraged people to buy Liberty bonds. To support the CPI's goals, the federal government published its own daily newspaper, the *Official Bulletin*, and distributed it in public places such as post offices.

Think Twice

How did the CPI attempt to change and shape public opinion about the war?

Enforcing Patriotism

In the United States, many progressives supported the war, believing it could be a vehicle for spreading democracy and social reform. American essayist Randolph Bourne was one outspoken critic of both U.S. involvement in the war and the progressive response to it. Recall from Unit 2 that the progressive movement aimed for political and social reform in the country. Bourne believed that many prominent progressives were eager to support Wilson's war aims by justifying them with their own "liberal purposes." For instance, they echoed Wilson's claim that the war was being fought for democracy and freedom. In his 1917 essay "The War and the Intellectuals," Bourne wrote:

> We have had to watch . . . in this country the same process which so shocked us abroad—the coalescence [joining together] of the intellectual classes in support of the military programme. . . . An intellectual class that was wholly rational would have called insistently for peace and not for war.

Bourne believed that the war would give power to "the least democratic" forces in American life. As he predicted, national movements gained influence and then used that power to suppress anyone who spoke out against the war.

Many other Americans had been critical of U.S. war involvement since the United States entered the war in 1917. Some of the most vocal criticism came from socialists and those involved in organized labor. The Socialist Party

leadership called the U.S. war declaration "a crime against the people of the United States." At the time, many socialists opposed the war because they believed it would primarily benefit the wealthy and powerful. Socialists generally believe that the government or the community should collectively own and manage major resources and industries, rather than leaving them in the hands of private companies. The Industrial Workers of the World (IWW), a workers' rights and labor organization founded in 1905, also officially opposed the war. The IWW had led several successful labor strikes by 1914 and continued to encourage strikes during wartime. One prominent anti-war voice was Eugene V. Debs, the longtime labor leader and socialist. Though not a member himself, Debs publicly defended the IWW and denounced the war as a betrayal of working people.

President Wilson worried that critics—including socialists, labor organizers, and even German Americans, who were increasingly viewed with suspicion—could undermine public support for the war. He believed the war effort required the public's total devotion to the cause. The U.S. government began passing laws and rolled out campaigns designed to stifle any dissent.

The American Protective League

Even before joining the war, the U.S. government had been concerned about potential spies living among the American public and giving information to foreign governments, such as Germany. However, the federal government lacked the resources to monitor the entire country for spies, so private citizens stepped in.

In March 1917, a group of private citizens in Chicago formed the American Protective League (APL), which later received approval from the U.S. Department of Justice. Its goal was to enforce patriotism and suppress dissent. The APL grew in national popularity as the war progressed, with more than 250,000 members in six hundred U.S. cities by the autumn of 1917.

Though the APL had the approval of the federal government, it was not a government agency and operated with little oversight. Its members were private volunteers who did not have the authority to make arrests. However, local police forces often encouraged APL members to identify anyone who seemed suspicious. People under suspicion included members of labor movements, anyone who might sympathize with Germany or disagree with the war, and any draft-eligible man who might be a "draft dodger."

APL members spied on their neighbors. They raided businesses, meeting halls, and homes to hunt for anyone who might be disloyal. One September 1918 raid in New York City lasted three days as the APL questioned thousands of suspected draft

dodgers. Those targeted by raids often had no formal charges brought against them but faced public humiliation, job loss, or physical intimidation. Civil liberties groups and some public officials later criticized the APL's tactics as unconstitutional, arguing that they violated First Amendment rights. However, no major legal action was taken to stop the group before the war ended.

Think Twice

What actions did the American Protective League take during World War I, and how did these actions support the U.S. government's goals during the war?

The Espionage and Sedition Acts

Shortly after the United States entered the war in 1917, President Wilson signed the Espionage Act of 1917. Fear of **espionage** contributed to the passage of the law. The purpose of the Espionage Act was to protect U.S. military operations and national security from spying and sabotage by foreign agents. The law went further than simply targeting foreign spies, however. The Espionage Act prohibited the spread of information that the government claimed could disrupt or undermine the war effort. It also outlawed

The Espionage and Sedition Acts attacked free speech in a way that disturbed many Americans, who did not believe the United States should imprison people for their political opinions. They saw the acts as hostile to democracy itself. Some Americans took to the streets to protest and advocate for people who had been imprisoned for speaking out against the war.

attempts to stir up disloyalty within the U.S. armed forces or to obstruct the recruitment and enlistment of military personnel. Offenders could be fined $10,000 or sent to prison for up to twenty years.

To enforce the law, the Espionage Act encouraged the post office to scrutinize and censor the mail. Any newspapers, magazines, or other forms of mail that inspectors decided were in violation of the Espionage Act could be considered "unmailable." Socialist publications, such as those from the IWW, were common targets. Federal agents raided the IWW offices in September 1917 to search for any information that violated the act; many IWW members were imprisoned.

The Sedition Act, passed in 1918, went a step further than the Espionage Act had and targeted speech. Speaking, writing, or publishing anything "disloyal" or "abusive" about the U.S. government, military, U.S. Constitution, American flag, or war effort became illegal. Moreover, it became illegal to speak or act in support of, or display the flag of, any country the United States was at war with.

Both the Espionage Act and the Sedition Act were sources of debate in Congress and in public discourse. Because the First Amendment guarantees free speech, many Americans saw the new laws as a direct violation of constitutional rights. Questions arose about whether the acts violated basic principles of democracy and freedom and whether censorship of the press was necessary. The war itself had raised the issue of whether national security or civil liberties were more important to the United States.

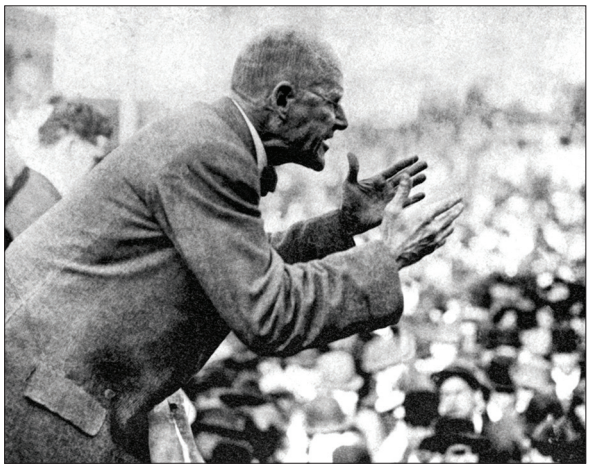
The U.S. government ended up prosecuting more than two thousand Americans under the Espionage and Sedition Acts. About half the cases resulted in conviction. The new laws also contributed to the view, held by many local authorities and some private citizens, that it was "un-American" and unpatriotic to be anything less than fully supportive of U.S. involvement in the war.

Think Twice

How did the Espionage Act and Sedition Act conflict with the First Amendment right to free speech?

Arrest of Eugene V. Debs

Socialist leader and labor organizer Eugene V. Debs soon became a symbol of the national debate over security and civil liberties. Debs viewed U.S. involvement in the war as another symptom of the class struggle. As he saw it, poor and working-class people were sacrificed as soldiers, while wealthy weapons manufacturers made more money from war production. In June 1918, Debs expressed his anti-war views in a speech to a gathering of socialists in Canton, Ohio. His speech included the statement "The master class has always declared the



In Canton, Ohio, Eugene V. Debs delivered a passionate speech that was critical of U.S. involvement in the war. Though he was convicted of violating the Sedition Act, he said at his sentencing, "My mind remains unchanged."

wars; the subject class has always fought the battles." Many listeners felt this indicated he believed the war was harmful to "subject class," or working-class, Americans. Agents from the U.S. Department of Justice were in the crowd, taking notes on whether Debs was violating the law. Soon, Debs was arrested and put on trial for violating the Sedition Act.

Debs's trial captured the nation's attention. He was ultimately convicted of violating the act. Addressing the court before his sentencing, Debs defended his remarks in Canton and said he would not take back a word. As a result, he was sentenced to ten years in prison.

Many Americans saw Debs as a martyr for free speech; others saw him as a traitor. His supporters remained loyal. In 1920, while still behind bars, Debs made his fifth run for president on the Socialist Party ticket and received almost a million votes. Debs did not end up serving the full ten-year sentence. President Warren G. Harding commuted his sentence in 1921, and he was released.

Think Twice

How did Eugene Debs's case represent the tension between national security and freedom of speech in the United States?

Schenck v. United States

Another high-profile case, this one involving the Espionage Act, was the trial of Charles Schenck, the general secretary of the Socialist Party. Schenck was in charge of distributing anti-draft pamphlets on the party's behalf. The pamphlets told Americans they had a right to oppose the draft and encouraged them to petition for the Selective Service Act to be overturned. Schenck was convicted of violating the Espionage Act. He appealed his conviction to the Supreme Court, arguing that the Espionage Act violated the First Amendment.

The Supreme Court upheld Schenck's conviction in 1919, ruling that the Espionage Act did not violate the amendment. Chief Justice Oliver Wendell Holmes, in his statement summarizing the court's decision, said that the government did not need to allow free speech if the speech "create[d] a clear and present danger." In other words, if speech poses an immediate threat to public safety or the functioning of government,

such as interfering with military recruitment, it can be restricted by law. This **precedent** became known as the "clear and present danger" test. Because Schenck's pamphlets encouraged resistance to the draft, the Supreme Court ruled that his actions could undermine the war effort and endanger national security. Holmes compared the sharing of anti-draft ideas to "a man . . . falsely shouting fire in a theatre and causing a panic." The case reflected the court's view that during wartime, certain civil liberties like free speech could be limited in the interest of national security.

Think Twice

What was the "clear and present danger" test, and how did it apply to free speech in the United States?

Discrimination Against German Americans

Because Germany was considered the United States' main enemy, pro-war propaganda increasingly targeted German culture, language, and people within the United States. CPI propaganda often portrayed Germans as barbaric villains while depicting American soldiers as noble defenders of freedom. The German kaiser was portrayed as a dangerous villain, and the German people were described as "Huns."

Across many states, schools halted the teaching of German, which had previously been common in American classrooms. German-language publications were forced out of business or chose to close, and many communities banned German-language books. Many Americans of German descent faced hostility, harassment, and violence, regardless of their personal views on the war.

Sacrifices and Social Changes

World War I reshaped everyday life across the United States, leaving few Americans untouched by its effects. Some wartime changes were temporary, like rationing food and fuel or purchasing Liberty bonds to support the military effort. Other changes had a lasting impact. Women entered the workforce and public institutions in greater numbers, and wartime labor shortages opened new economic opportunities for African Americans.

Conserving Food for the Troops

The federal war effort in the United States included feeding the troops, as well as sending food to European civilians affected by the war. The U.S. Food Administration, created in August 1917 and led by Herbert Hoover, managed food supply, production, and distribution.

Hoover launched a national publicity campaign urging Americans to reduce their food consumption and avoid waste to support

The U.S. Food Administration advised American households to consume less food to ensure a steady food supply for soldiers. Americans were encouraged to think of conservation as their contribution to the war effort.

the military. Households were urged to consume less wheat, meat, sugar, and butter and to participate in initiatives like "meatless Mondays" or "wheatless Wednesdays." The campaign suggested ingredient substitutions and portion control techniques. What came to be called the "gospel of the clean plate" discouraged food waste.

People were also advised to grow their own vegetable gardens. These gardens came to be called *victory gardens*. Posters announced that "food will win the war" and that by gardening, Americans would "sow the seeds of victory." By convincing Americans to consume less and produce more, Hoover was able to avoid rationing, which would have limited food supplies to a fixed amount per household.

To meet the military's growing need for food, the federal government also supported farmers through subsidies and price guarantees. These measures reassured farmers that they would not lose money on their crops, encouraging them to expand production of key crops such as wheat and corn, as well as increase their livestock. Many farmers took out loans to buy more land and invest in new machinery like tractors and harvesters, modernizing their operations. Wartime demand and federal policies led to a temporary agricultural boom. However, once the war ended and demand fell—and the government's price guarantees expired—many of these farmers were left with high debts and overproduction, problems that would contribute to rural hardship and farm failures during the 1920s.

Food conservation became associated with patriotism. To some Americans, eating more than one's share of food was a sign of disloyalty. Americans, including those in the American Protective League, sometimes monitored their neighbors to make sure they were following food control measures.

Think Twice

How was Herbert Hoover able to avoid food rationing during the war?

Women's Roles in the War

Though American women did not fight in the trenches, they were vital to the war effort abroad and at home. Thousands of American women served on the Western Front as clerical workers, nurses, drivers, or auto mechanics. In France, many women joined the AEF Signal Corps, the branch of the AEF responsible for communications, as long-distance telephone switchboard operators. Called the "hello girls," these operators translated communications between English-speaking service members and French-speaking telephone workers. Back in the United States, a group called the Women's Land Army took over the farming jobs that men once held. Many women took jobs in factories producing weapons and other war goods.

Women suffragists realized they could use the war to push for voting rights. The National American Woman Suffrage Association, led by Carrie Chapman Catt, supported U.S. war involvement. Catt believed that if women demonstrated wartime patriotism, the government would be more likely to reward them with suffrage. Alice Paul, the head of the National Woman's Party, argued that if the country was fighting for democracy and freedom abroad, it should give full democratic rights to its citizens at home. These women's efforts likely played a role in President Wilson's eventual support for women's suffrage. In a 1918 speech to the Senate, Wilson argued in favor of the Nineteenth Amendment, stating, "We have made partners of the women in this war; shall we admit them only to a partnership of suffering and sacrifice and toil and not to a partnership of privilege and right?" In 1920, not long after the war ended, the Nineteenth Amendment was ratified, granting women the right to vote nationwide.

Women in the United States took jobs in agriculture—jobs previously occupied by men who had gone to the front—as part of the Women's Land Army. This poster uses the flag and uniforms to compare their service to military service.

Think Twice

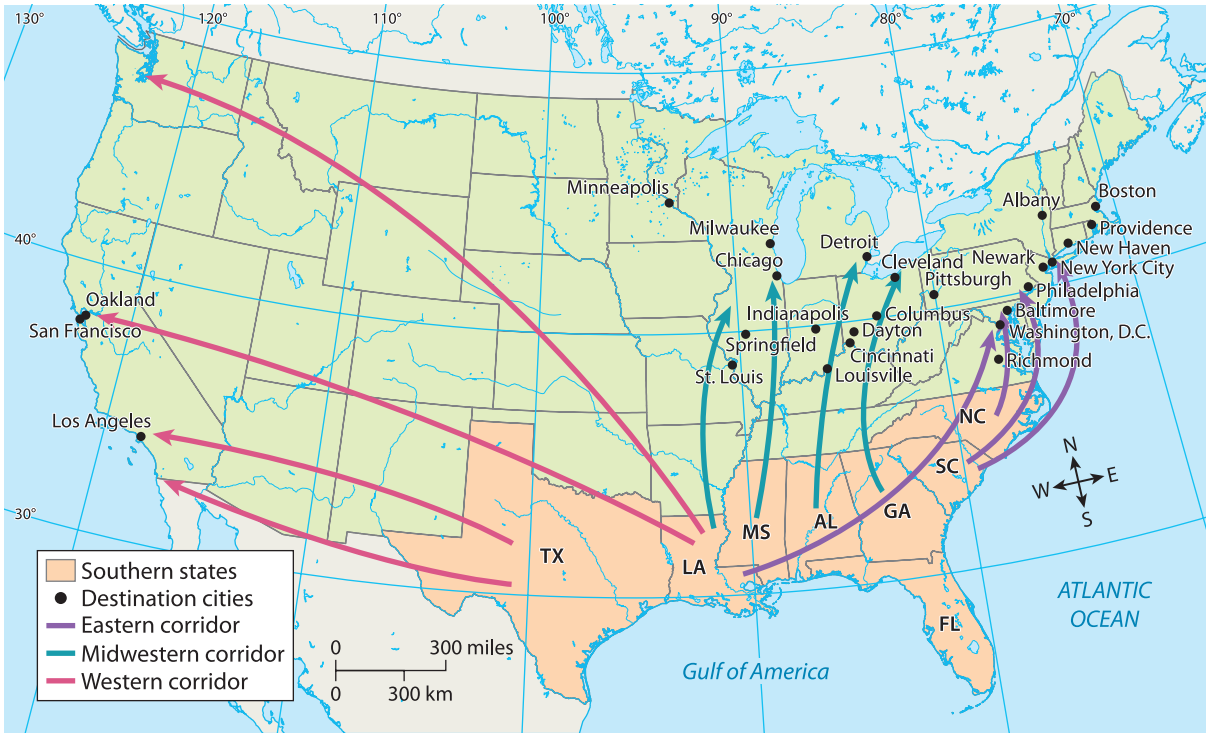
How did World War I affect women's rights in the United States?

African Americans and the Great Migration

From around the mid-1910s to 1940, millions of African Americans moved from the rural South to the North, West, and Midwest in the first phase of what historians call the Great Migration. Many African Americans moved in search of better-paying jobs, especially those created by wartime industries in Northern cities. World War I left many industrial and factory jobs vacant in the North, West, and Midwest as men went to the front. War production jobs were particularly plentiful in factories that produced weapons and other necessary war materials. These jobs offered higher wages than agricultural work—although, Black workers were often paid less than white workers for doing the same jobs. Besides pursuing economic opportunity, African Americans often wanted to escape the pervasive threat of racial violence in the South, where racial segregation and white supremacy were enforced under Jim Crow laws.

As a result, African Americans became a larger presence in cities in the North and Midwest, changing their cultural and demographic landscapes. The Black populations of

The Great Migration, 1910–40



During and after World War I, many African Americans left the South in a movement known as the Great Migration. This map shows migration trends and destination cities in the North, Midwest, and West, where people sought better economic opportunities. The war created new industrial jobs in cities like Chicago, Detroit, and Los Angeles, drawing large numbers of migrants from Southern states.

New York City, Chicago, Philadelphia, and Detroit, for example, grew significantly. However, African Americans continued to face racism and injustice in these cities, including hiring and housing discrimination; for instance, they often were forced to live in racially segregated neighborhoods.

Despite these challenges, African American communities in Northern and Midwestern cities developed vibrant cultural and intellectual scenes. New migrants brought with them musical styles like blues and ragtime, which helped give rise to jazz in cities such as Chicago and New York. Jazz, which had developed in New Orleans, migrated north with African American musicians and performers. These cultural contributions would become even more influential during the 1920s, a period known as the Jazz Age.

Think Twice

What were the effects of World War I on the home front?

A Victory for the Allies

A combination of economic pressure, battlefield losses, and internal unrest brought the Central powers to the brink of collapse by late 1918. Germany had entered the war as an industrial powerhouse, but the long British naval blockade had severely limited its access to food and raw materials, leading to widespread starvation and hardship within Germany. Repeated failure to break through the Western Front, combined with mounting losses and declining morale, contributed to German unrest and eventual revolt. In October and November 1918, German sailors, workers, and soldiers launched uprisings across the country. Faced with revolution, the German government collapsed, and Kaiser Wilhelm II abdicated on November 9.

At the same time, U.S. involvement had provided the Allies with major economic and military advantages. Without access to the Allies' global trade networks and lacking a source of aid that could match the aid that the United States provided the Allies, the Central powers struggled to match their war production. Moreover, the Hundred Days Offensive and the Battles of Meuse–Argonne delivered a crushing defeat to Germany. Within weeks, American and French troops recaptured territory that the Germans had fought to acquire and control over four years of war. Germany's military, weakened by the efforts required for its 1918 spring offensive, was near collapse by early November 1918. Its ally Austria-Hungary was facing internal turmoil and had stopped fighting. Austria-Hungary signed an armistice with Italy on November 3. The war was reaching an end.

On the morning of November 11, the new German government sent representatives to

Soldiers celebrated the news of the armistice on November 11, 1918, which ended fighting at the Western Front and signaled the war would soon be over. November 11 became known as Armistice Day internationally; today, this date is Veterans Day in the United States.

negotiate an end to the fighting. Ending the war had been one of the central demands of the revolutionaries who had forced the kaiser's abdication just days earlier. German and French leaders met in a railway car in France and signed their own armistice on the morning of the eleventh day of the eleventh month. While this agreement did not end the war, it did officially stop fighting on the Western Front. Troops were ordered to evacuate the front, and Germany was ordered to release any soldiers it had taken prisoner.

New weapons technologies made World War I the deadliest war in history at the time. World War I marked the first major conflict in which more soldiers died in combat than from disease, though illness still claimed many lives. About 8 million soldiers were killed in battle, while another 1 to 2 million died from disease. Millions more were injured. Recent scholarship estimates that approximately 16 million civilians died as a result of the war, including roughly 12.5 to 13 million who perished from war-related hunger, famine, and disease.

Think Twice

Explain three factors that led to the end of World War I.

Bringing the U.S. Troops Home

After the November 1918 armistice, the U.S. war effort had officially come to an end. The country now faced the complex process of demobilization, which involved bringing millions of soldiers and other service members home. Many troops stayed in "debarkation camps" in Europe until the United States could secure their transportation home. The final U.S. troops remained in Europe until the summer of 1919, even after the formal end of the war.

Once the soldiers arrived home as veterans, many struggled to readapt to civilian life. More than two hundred thousand returned with physical or mental disabilities, including more than four thousand with amputated limbs. Anxiety and depression were common among veterans.

The American Legion's official emblem, or symbolic logo, includes a star symbolizing victory in World War I. The wreath encircling the star represents a memorial to soldiers who died at war.

They also faced a nationwide unemployment crisis. War production factories had closed, leaving many Americans out of jobs. Women and African American workers who had taken factory jobs when men left for the front were now unemployed. Veterans also struggled to find work. By April 1919, around 40 percent of veterans remained unemployed. The government developed an industrial training program to help veterans find jobs in public works projects and other industries.

However, veterans discovered that the federal government did not have enough systems in place to support their needs. In 1919, a group of military officers founded the American Legion to give veterans a voice in politics. As a result of their advocacy, Congress created the U.S. Veterans Bureau in 1921, known today as the U.S. Department of Veterans Affairs.

Think Twice

What difficulties did U.S. veterans face when they arrived home after the war?

A Complicated Path Toward Peace

As the war was nearing its conclusion, President Wilson faced another difficult task—working alongside other world leaders to decide how countries should

interact going forward, after a brutal war had pitted them against each other. Well before the war's end, Wilson had thought about what a postwar peace settlement would look like. He asked a group of political and social scientists to research the causes of the war and study Allied governments' policies. Based on their research, Wilson created a fourteen-point plan for world peace and presented the plan to Congress in January 1918. His Fourteen Points were broadcast worldwide, including in combat zones to encourage the Allies. Translated leaflets with the Fourteen Points were dropped behind enemy lines as well. In October 1918, the German imperial chancellor requested that Wilson and the United States use the Fourteen Points as the basis for peace negotiations.

Wilson's fourteen-point peace plan included the creation of an international peacekeeping group called the League of Nations. In 1919, Wilson, shown here with his wife, went on a speaking tour across the United States to gather public support for the league.

Wilson's Fourteen Points

The first five points on Wilson's list were general guidelines for nations to follow in order to promote international peace and prevent future wars. The first point called for international diplomacy to be more open and public and for an end to secret treaties between countries. The second point advocated freedom of the seas, allowing all nations to navigate and trade safely in both wartime and peacetime. The third point called for eliminating trade barriers between nations, and the fourth urged countries to reduce their stockpiles of weapons. The fifth point advised giving more power to the populations of colonized nations and called for the "adjustment of all colonial claims." In these opening points, Wilson addressed many of the factors that had led to or escalated the war—entangled alliances, unrestricted submarine warfare, countries' large stores of weapons, and world powers' desire to keep control of their colonies and empires at all costs. Points six through thirteen described how Europe's territorial boundaries should be redrawn after the war, with the goal of giving every nation political independence—a concept sometimes referred to as self-determination.

The fourteenth point was perhaps the most important to Wilson. He proposed establishing an international organization to promote peace and resolve global disputes. Wilson believed this group could settle

PRIMARY SOURCE: FOURTEEN POINTS, WOODROW WILSON, 1918

What we demand . . . is that the world be made fit and safe to live in; and particularly that it be made safe for every peace-loving nation which, like our own, wishes to live its own life, determine its own institutions, be assured of justice and fair dealing by the other peoples of the world as against force and selfish aggression. . . . The programme of the world's peace, therefore, is our programme; and that programme, the only possible programme, as we see it, is this:

I. Open covenants of peace, openly arrived at, after which there shall be no private international understandings of any kind but diplomacy shall proceed always frankly and in the public view.

II. Absolute freedom of navigation upon the seas, outside territorial waters, alike in peace and in war, except as the seas may be closed in whole or in part by international action for the enforcement of international covenants.

III. The removal, so far as possible, of all economic barriers and the establishment of an equality of trade conditions among all the nations consenting to the peace and associating themselves for its maintenance.

IV. Adequate guarantees given and taken that national armaments will be reduced to the lowest point consistent with domestic safety.

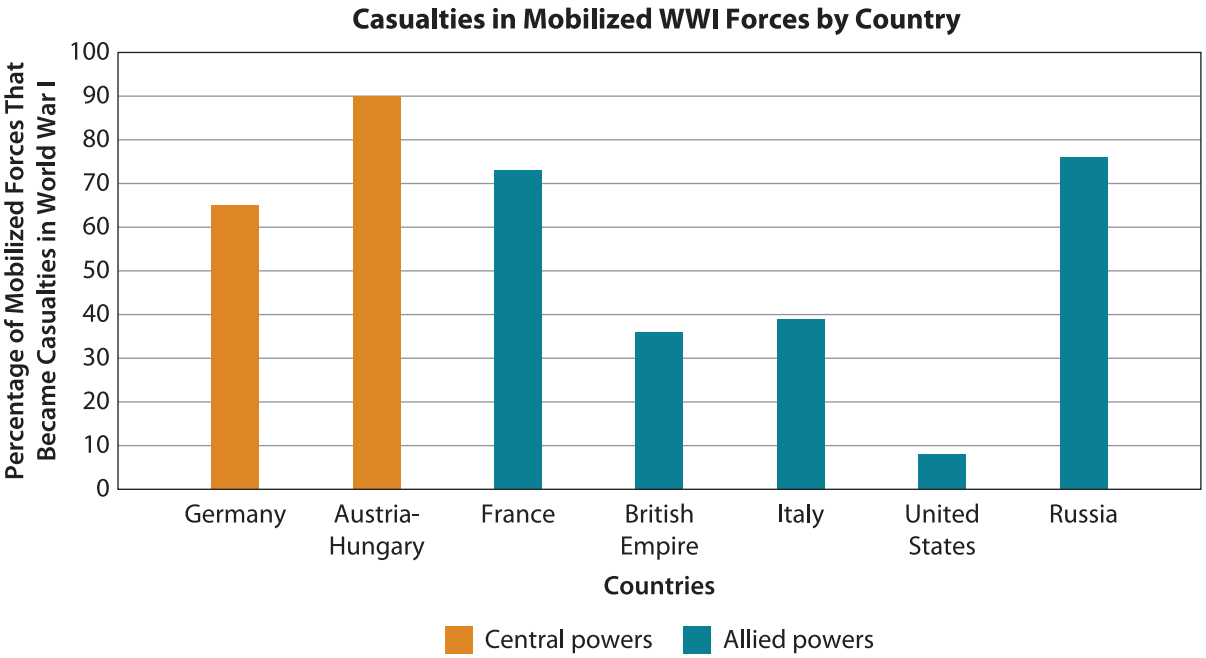
V. A free, open-minded, and absolutely impartial adjustment of all colonial claims, based upon a strict observance of the principle that in determining all such questions of sovereignty the interests of the populations concerned must have equal weight with the equitable claims of the government whose title is to be determined. . . .

XIV. A general association of nations must be formed under specific covenants for the purpose of affording mutual guarantees of political independence and territorial integrity to great and small states alike.

In regard to these essential rectifications of wrong and assertions of right we feel ourselves to be intimate partners of all the governments and peoples associated together against the Imperialists. We cannot be separated in interest or divided in purpose. We stand together until the end.

. . . We wish the right to prevail and desire a just and stable peace such as can be secured only by removing the chief provocations to war, which this programme does remove.

Source: Wilson, Woodrow. "President Woodrow Wilson's Message to Congress." January 8, 1918. National Archives Catalog. National Archives. https://catalog.archives.gov/id/5752371.



This graph shows the percentage of each country's mobilized armed forces that were considered casualties in World War I—those who were killed, wounded, or missing in action. The United States, which entered the war in 1917, suffered a much lower percentage of casualties than most European countries.

disputes between nations—such as those between small, independent countries and large empires—before these disputes turned to war. The group came to be called the League of Nations.

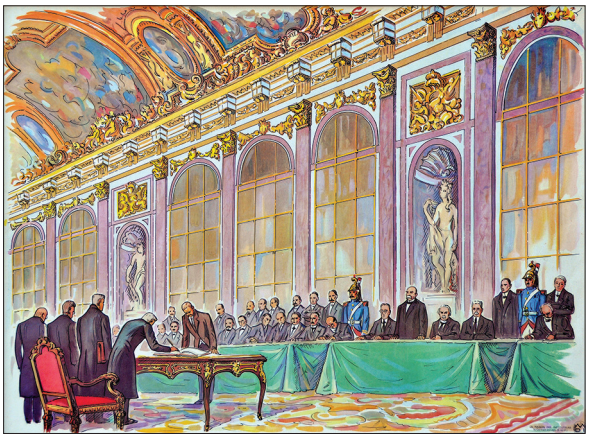
Think Twice

How did Wilson's Fourteen Points address the causes of World War I?

The Treaty of Versailles

In January 1919, President Wilson joined Allied leaders and other representatives at the Paris Peace Conference, held in Versailles (/ver*sigh/), just outside the French capital. The conference's task was to create the treaty that would formally end the war. Along with Wilson, British prime minister David Lloyd George, French prime minister Georges Clemenceau, and Italian prime minister Vittorio Orlando were the most influential voices, though nearly thirty nations participated. The final agreement, known as the Treaty of Versailles, was shaped largely by these leading figures.

Britain, France, and other countries mostly wanted to make Germany pay for its actions. Many European countries had fought Germany since 1914, much longer than the United States had. And while the United States was physically distant from the fighting, European countries were much closer to the battlefields, and in some cases



The Treaty of Versailles was signed in the Hall of Mirrors in the Palace of Versailles, France, on June 28, 1919.

the battles took place on their soil. France, located directly on the Western Front, had been especially harmed by the German military. By the end of the war, they had suffered millions of casualties as well as destroyed cities and devastated farmlands.

The conference did not work out the way Wilson had hoped, especially regarding his vision for lasting peace. Wilson had wanted the Fourteen Points to serve as the guiding framework for postwar peace and diplomacy. The leaders did agree to form a League of Nations; they also believed that collective international security should be a priority to prevent another devastating war. The Treaty of Versailles included a written agreement that explained how countries in the league would work together and protect each other. But world leaders were less interested in Wilson's other points and more interested in national security and in regaining territories their countries had lost during the war. European leaders disputed the territorial boundaries Wilson had drawn up in the Fourteen Points; some nations had already made private agreements with one another about territorial distribution that differed from the divisions Wilson proposed.

Think Twice

What did Wilson hope to achieve with his peace plan after World War I?

Penalties for Germany

Most of the Allied powers' leaders believed Germany was responsible for the war. European countries on the Western and Eastern Fronts had seen the physical destruction Germany's and other Central powers' fighting forces did to their countries, and they wanted Germany to fix the damage.

A "war guilt" clause was added to the Treaty of Versailles. The clause forced Germany to accept responsibility for the war and to pay financial reparations to Allied countries. Although the exact amount was not set at the conference, Germany was later required to pay reparations totaling billions of dollars. Many Allied leaders hoped to weaken Germany's economy to prevent it from becoming a future military threat.

The treaty also directly addressed the German military threat. Germany's military was restricted to one hundred thousand troops, and it was banned from producing submarines, poison gas, and other offensive weapons. Additionally, Germany was forced

PRIMARY SOURCE: OBSERVATIONS OF THE GERMAN DELEGATION ON THE CONDITIONS OF PEACE, ULRICH VON BROCKDORFF-RANTZAU, 1919

In May 1919, the German delegation at Versailles received the Allies' draft peace terms. Ulrich von Brockdorff-Rantzau, Germany's foreign minister, wrote a protest letter to French prime minister Georges Clemenceau. In it, he condemned the Treaty of Versailles as unfair and impossible for Germany to accept.

We came to Versailles in the expectation of receiving a peace proposal based on the agreed principles. . . . We hoped for the peace of justice which had been promised to us. We were aghast when we read in that document the demands made upon us by the victorious violence of our enemies. . . .

. . . Germany, thus cut in pieces and weakened, must declare herself ready in principle to bear all the war expenses of her enemies, which would exceed many times over the total amount of German State and private assets. . . . The German people would thus be condemned to perpetual slave labour.

In spite of these exorbitant demands, the reconstruction of our economic life is at the same time rendered impossible. We must surrender our merchant fleet. We are to renounce all foreign securities. We are to hand over to our enemies our property in all German enterprises abroad, even in the countries of our allies. Even after the conclusion of peace the enemy States are to have the right of confiscating all German property. No German trader in their countries will be protected from these war measures. We must completely renounce our Colonies, and not even German missionaries shall have the right to follow their calling therein. We must thus renounce the realisation of all our aims in the spheres of politics, economics, and ideas. . . .

In other spheres also Germany's sovereignty is abolished. . . . The German people is excluded from the League of Nations to which is entrusted all work of common interest to the world. . . .

Thus must a whole people sign the decree for its own proscription, nay, its own death sentence.

Source: Brockdorff-Rantzau, Ulrich von. "Observations of the German Delegation on the Conditions of Peace." Letter to Georges Clemenceau, May 29, 1919. In *Papers Relating to the Foreign Relations of the United States: The Paris Peace Conference, 1919*. Vol. 6. Washington, D.C.: Government Printing Office, 1946, pp. 795–797.

Germany's decision to sign the Treaty of Versailles made international news. By signing the peace treaty, German representatives accepted severe financial and territorial penalties for their country.

to surrender 10 percent of its prewar territory in Europe to other European countries and give up all its overseas colonies. This included returning Alsace-Lorraine to France and ceding parts of eastern Germany to the newly reestablished Poland. Germany also lost territory to Czechoslovakia, including parts of the Sudetenland.

The final Treaty of Versailles was presented to the Germans in May 1919. Germany was not invited to the Paris Peace Conference. During the armistice negotiations in November, German representatives had been led to believe that the treaty would be based on the Fourteen Points. Instead, they received a treaty that imposed harsh penalties and omitted many of Wilson's proposed reforms. They were alarmed by the treaty's severity and feared that the heavy reparations would devastate Germany's economy. Still, they signed the treaty in late June. They were given little choice but to do so, as the victorious Allies threatened to resume the war unless the treaty was signed.

Germany was not the only country dissatisfied with the outcome. Italy, which had joined the Allies during the war with the expectation of territorial rewards, did not receive the land it had been promised by Britain and France. This postwar disappointment became known in Italy as the "mutilated victory." As you will read in Unit 4, the sense of betrayal and national humiliation would later be used by Benito Mussolini and his followers to rally support for Fascism.

Think Twice

How were the Fourteen Points similar to and different from the Treaty of Versailles?

Treaty Debate and Rejection in the United States

Before President Wilson could officially sign the Treaty of Versailles on behalf of the United States, he needed Congress to agree to it. He worked to get the American public to support

PRIMARY SOURCE: RESERVATIONS TO THE TREATY OF PEACE, HENRY CABOT LODGE, 1919

After returning from the 1919 Paris Peace Conference, President Wilson pushed for U.S. membership in the League of Nations. He faced strong Senate opposition led by Senator Henry Cabot Lodge, who feared it would threaten U.S. sovereignty and demanded key amendments.

I object in the strongest possible way to having the United States agree, directly or indirectly, to be controlled by a league which may at any time, and perfectly lawfully and in accordance with the terms of the covenant, be drawn in to deal with internal conflicts in other countries, no matter what those conflicts may be. . . .

. . . The broad fact remains that if any member of the league suffering from external aggression should appeal directly to the United States for support the United States would be bound to give that support in its own capacity and without reference to the action of other powers, because the United States itself is bound, and I hope the day will never come when the United States will not carry out its promises. . . .

. . . There are, of course, many others, but these points, in the interest not only of the safety of the United States but of the maintenance of the treaty and the peace of the world, should be dealt with here before it is too late. Once in the league the chance of amendment is so slight that it is not worth considering. Any analysis of the provisions of this league covenant, however, brings out in startling relief one great fact. Whatever may be said, it is not a league of peace; it is an alliance, dominated at the present moment by five great powers, really by three, and it has all the marks of an alliance. The development of international law is neglected. The court which is to decide disputes brought before it fills but a small place. The conditions for which this league really provides with the utmost care are political conditions, not judicial questions. . . . This league to enforce peace does a great deal for enforcement and very little for peace. It makes more essential provisions looking to war than to peace for the settlement of disputes. . . .

I am as anxious as any human being can be to have the United States render every possible service to the civilization and the peace of mankind, but I am certain we can do it best by not putting ourselves in leading strings or subjecting our policies and our sovereignty to other nations. The independence of the United States is not only more precious to ourselves but to the world than any single possession. . . . The United States is the world's best hope, but if you fetter her in the interests and quarrels of other nations, if you tangle her in the intrigues of Europe, you will destroy her power for good and endanger her very existence.

Source: 58 Cong. Rec. S3779–3784.

the treaty and the League of Nations, and the majority did.

The Senate, however, rejected the treaty when Wilson brought it before it in 1919—the first time the U.S. government had refused to ratify a peace treaty. The Senate then debated the issue for months. Senate objections centered on one section, Article X of the proposed Covenant of the League of Nations, which concerned security measures that League of Nations members were expected to take. According to Article X, each member nation had to protect other member nations from "external aggression." In other words, members might be obligated to use military force to defend another country's independence if it were attacked. Many senators felt the requirement violated U.S. sovereignty. They believed only Congress, not foreign governments, should decide if the United States went to war. Henry Cabot Lodge, the chairman of the Senate Foreign Relations Committee, argued that other

The League of Nations comprised forty-one member countries when it was officially formed in 1920 and later grew to include sixty-three countries. However, the United States never joined because Congress never approved the Treaty of Versailles.

countries should not be able to commit U.S. troops to fighting a dangerous war overseas.

The senators who opposed the treaty split into two groups. The Reservationists, including Lodge, were open to an amended version. The Irreconcilables refused to accept the treaty at all. Wilson ultimately refused to compromise on Article X, and when the Treaty of Versailles was presented to the Senate for a final vote in March 1920, it was rejected a second time.

As a result, the United States never joined the League of Nations and never ratified the Treaty of Versailles. Wilson negotiated a separate peace treaty with Germany that left out the League of Nations. The Senate debate and result showed that the United States would continue to have a complicated relationship with international alliances. Without the membership of the United States, the League of Nations proved to be ineffective in the period of crisis that followed. The way World War I ended, and particularly the terms of the Treaty of Versailles, meant that it would not be "the war to end all wars." Instead, it laid the groundwork for another, even deadlier conflict: World War II.

Think Twice

Why did the Senate reject the Treaty of Versailles, and what were the consequences of this decision?

Glossary

A

abolition, n. the formal and legal end of the practice of slavery **(1–2)**

accommodationist, adj. compromising or adapting to the attitudes of someone else **(2–3)**

alliance, n. an agreement between countries to support each other in case of war or other threats to security **(3–2)**

ambassador, n. an official sent to represent their country's government abroad **(3–1)**

amnesty, n. a decision, usually by a government, not to punish a person or group that has committed a crime **(2–1)**

anarchy, n. absence of government **(2–2)**

annexation, n. the process of adding a region to a country as part of its territory **(1–2)**

apportionment, n. the assignment of seats in a legislature or other government body **(1–1)**

armistice, n. a formal agreement between countries at war to stop fighting **(3–2)**

arms race, n. a competition between two nations in which each one tries to accumulate and develop more and better military weapons than the other **(3–2)**

artillery, n. large guns moved on wheels and metal tracks **(3–2)**

assimilate, v. to absorb into the cultural tradition of a group or population **(1–2)**

autonomous, adj. making decisions for oneself and acting on them without interference **(1–1)**

B

bimetallism, n. a monetary standard based on two metals, such as gold and silver **(2–3)**

bond, n. a financial guarantee made by a government or company **(2–1)**

C

capitalism, n. an economic system in which resources and businesses are privately owned and the government does not control prices **(2–2)**

charter, n. a document issued by an authority, such as a government, granting a group or entity certain rights or privileges **(1–2)**

checks and balances, n. a system in which the branches of government can limit each other's powers **(1–1)**

civilian, adj. having the status of one who is not a member of the armed forces **(1–2)**

codify, v. to standardize or classify **(1–1)**

collective bargaining, n. the negotiation of better wages and working conditions by a group, such as a union **(2–2)**

communism, n. an economic system in which all property is publicly owned and the government makes all decisions about production and distribution **(2–2)**

confederation, n. a group of individual states that join together for specific, limited purposes **(1–1)**

conscription, n. a system that requires individuals to serve in the military; also known as the draft **(1–3)**

cooperative, n. an organization that is owned and operated by its users for their own economic benefit **(2–3)**

corporation, n. a type of business that is granted various rights and duties and is authorized by law to act as a single person despite being made up of one or more people **(2–2)**

coup, n. the overthrow of an existing government by force **(3–1)**

D

de facto, adj. existing in fact, even if not legally or officially **(1–3)**

diplomacy, n. the process of managing and communicating with foreign governments peacefully to meet policy goals **(1–1)**

dissent, n. public disagreement with an official decision **(1–1)**

E

entrepreneur, n. an individual who creates, organizes, and assumes the risk of a business **(2–2)**

espionage, n. spying on a foreign government by collecting information about its activities **(3–2)**

extralegal, adj. not regulated by law **(1–3)**

F

federalism, n. a system of government in which power is shared between the national government and the states **(1–1)**

franchise, n. the constitutional right to vote **(1–3)**

I

imperialism, n. the practice of gaining power as a country by taking political and economic control over other areas of the world **(3–1)**

impressment, n. forcible recruitment into a country's military, usually its navy **(1–2)**

inalienable, adj. unable to be lost, given up, or taken away **(1–1)**

industrialization, n. a shift to the widespread use of machines and factories to produce goods **(2–2)**

infantry, n. a group of soldiers trained to fight on foot or as ground forces **(3–2)**

inflation, n. the general increase in prices over time **(1–2)**

inherent, adj. being part of the nature of a thing or person **(1–3)**

initiative, n. a process that allows citizens to propose and enact new laws through petition and popular vote **(2–3)**

injunction, n. a court order that specifies an action a person or group must or must not take **(2–2)**

isolationism, n. a country's refusal to get involved in the problems or conflicts of other countries **(3–2)**

J

judicial review, n. the principle that courts hold legal power to determine whether laws are constitutional **(1–2)**

L

lynching, n. the killing of a person by a mob, often by hanging **(2–3)**

M

mechanization, n. the process of replacing human or animal labor with machine labor **(2–2)**

mercenary, n. a private individual hired to fight on behalf of a foreign country **(1–1)**

militarism, n. the belief that a nation needs a strong military to achieve its political goals **(3–2)**

militia, n. a body of regular citizens who volunteer for part-time or on-demand military service **(1–1)**

mobilization, n. the process of preparing a nation's armed forces for active service **(3–2)**

monopoly, n. exclusive control over a product or service by a company or other entity, eliminating competition **(2–2)**

mutiny, n. a rebellion by soldiers or sailors against their commanding officers **(1–1)**

N

nationalism, n. support for national interests above those of other countries or groups **(1–2)**

nativism, n. a preference for people born in one's own country rather than immigrants **(2–1)**

neutrality, n. a country's decision not to take a side in a conflict such as a war **(3–2)**

O

occupation, n. control of an area, usually by a military force **(1–3)**

offensive, n. a planned attack made by a group of soldiers **(3–2)**

P

Parliament, n. the legislative body of Great Britain, composed of the House of Lords and the House of Commons **(1–1)**

partisan, adj. based on support of political parties or movements **(1–1)**

party boss, n. an individual who holds the greatest power in a political party at the local, state, or national level **(2–2)**

patronage, n. granting of political offices and other favors to friends, allies, and relatives **(1–2)**

platform, n. the policies supported by a political party **(2–3)**

"political machine" (phrase) a group that maintains political control, usually of a city, through bribery and intimidation **(2–2)**

popular sovereignty, n. the principle that a government's powers originate from the people and that government actions should reflect the will of the people **(1–1)**

populism, n. a political perspective that gives priority to the interests of ordinary people **(2–3)**

precedent, n. a court decision that is used as an example to decide similar cases in the future **(3–2)**

propaganda, n. information and communication used to influence public opinion, often in support of a cause or movement **(3–2)**

protectorate, n. a country guarded and controlled by another country that is usually larger and more powerful **(3–1)**

R

ratification, n. formal adoption of a treaty or other agreement **(1–1)**

raw material, n. the basic substance from which a product is made **(2–2)**

recall, n. a process that allows citizens to remove public officials through a popular vote **(2–3)**

recession, n. a period of significantly reduced economic activity, characterized by a decline in both employment and production, that lasts more than a few months **(1–2)**

referendum, n. a process that allows citizens to uphold or overturn existing legislation through a popular vote **(2–3)**

repeal, v. to cancel or reverse a law **(1–1)**

republic, n. a system of government in which citizens exercise power through their elected representatives **(1–1)**

reservation, n. an area of land set aside by the federal government for Native Americans **(2–1)**

revenue, n. income; money brought in **(1–1)**

S

"salutary neglect" (phrase) policy under which the British government allowed its North American colonies to control many trade and regional government decisions as long as the colonies remained profitable and loyal **(1–1)**

secession, n. formal withdrawal from a country or other political group **(1–3)**

sectionalism, n. extreme devotion to distinct regions of a country, such as the North and South in the nineteenth-century United States **(1–3)**

sedition, n. an act of inciting resistance or revolt against a government **(1–1)**

segregation, n. the enforced separation of people by race, ethnicity, religion, or sex **(1–3)**

separation of powers, n. the division of government into different branches with distinct powers and responsibilities **(1–1)**

socialism, n. an economic system in which the government or community collectively owns and controls major industries **(2–2)**

sovereignty, n. a state's or country's authority to govern itself and its people **(1–1)**

sphere of influence, n. an area of the world where one country has strong political and economic influence and control **(3–1)**

strike, n. a practice of workers refusing to work until the company meets their demands in negotiations **(2–2)**

strike down, v. to declare a law null and void because it conflicts with something, often the Constitution **(1–2)**

subsidize, v. to support with public money **(1–1)**

suffragist, n. a person who supports extending the right to vote, especially to women **(2–3)**

sweatshop, n. a type of factory in which employees work long hours for low

wages in cramped and otherwise unsafe conditions **(2–2)**

T

tariff, n. a tax imposed on imported goods **(1–2)**

transcontinental, adj. stretching across an entire continent **(2–1)**

trauma, n. a strong behavioral and emotional response to highly stressful events **(3–2)**

treason, n. the crime of attempting to overthrow one's government or aid its enemies **(1–1)**

trust, n. a combination of corporations created to reduce competition and control prices **(2–2)**

U

ultimatum, n. a final demand that will lead to forceful action if it is rejected **(3–2)**

unconstitutional, adj. incompatible with the U.S. Constitution and/or with the constitution of a state **(1–2)**

urbanization, n. the formation and growth of cities **(2–2)**

X

xenophobia, n. a hatred or fear of people or things that come from another country **(2–2)**

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An enormous pile of buffalo skulls at the C. D. Glueworks, Rougeville, Michigan in 1892. Bison hunters stripped the skins and left the carcasses and bones behind on the plains. A market grew for the abandoned bison skeletons when the bones were found to make excellent fertilizer. Based on an average price of $8 per ton, this trade brought 2.5 million dollars into Kansas between 1868 and 1881 / Everett Collection / Bridgeman Images: 135

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Broadside announcing peace between the US and Great Britain after the War of 1812, printed in the 'Connecticut Courant', 1815 (print) / American School, (19th century) / American / American Antiquarian Society, Worcester, Massachusetts, USA / © Courtesy, American Antiquarian Society / Bridgeman Images: 54a

Cartoon protesting against the Embargo Act of President Thomas Jefferson in 1807, United States, which tries to maintain the neutrality of the United States in the Napoleonic Wars: he refuses to choose between Britain and France. As a result, no ship can enter or exit U.S. ports. Only a few illegal exchanges persisted, with trade between the United States and the rest of the world almost completely disappearing and damaging American prosperity. Colour engraving of the 19th century. / Photo © North Wind Pictures / Bridgeman Images: 51

CBW / Alamy Stock Photo: Cover E, 256, 306

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Civilians after the Battle of Château-Thierry, 1918 / Unknown photographer, (20th century) / Universal History Archive / UIG / Bridgeman Images: 293

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clearing of Panama canal between 1879 and 1914 to link Pacific and Atlantic oceans under the leadership of FerdinanddeLesseps / Tallandier / Bridgeman Images: 259

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Defile workers on strike to obtain 8 hours of work a day in New York, USA 1872. Colouring engraving of the 19th century. / Photo © North Wind Pictures / Bridgeman Images: 176

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From Original Negative / Alamy Stock Photo: 308

General John Pershing (1860–1948) american commander in Europe during 1st world war, is leaving Paris to go in United States on august 31, 1919 / Tallandier / Bridgeman Images: 286b

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GL Archive / Alamy Stock Photo: 21, 98, 268–269

Glasshouse Images / Alamy Stock Photo: 63, 77, 172

Gold Rush prospector, 1849 (b/w photo) / American Photographer, (19th century) / American/ Private Collection / Peter Newark American Pictures / Bridgeman Images: 122

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Map of the Louisiana Purchase, 1926 (engraving) / American School, (20th century) / American / Private Collection / Photo © GraphicaArtis / Bridgeman Images: 48

Martin Shields / Alamy Stock Photo: 19

Members of the League of Nations (colour litho) / English School, (20th century) / English / Private Collection / © Look and Learn / Bridgeman Images: 315

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Mulberry Street, Manhattan, c.1900 (photochrome) / Detroit Photographic Co. (fl.1898–1900) / American / Private Collection / Avant-Demain / Bridgeman Images: 168

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Panama Canal (colour litho) / Bartholomew, John George (1860–1920) / British / Private Collection / © Look and Learn / Bridgeman Images: 258

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Poster advertising 'Uncle Tom's Cabin', 1852 (colour litho) / American School, (19th century) / American / The New York Historical, USA / © The New York Historical / Bridgeman Images: 80

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School panel of "The House of the Teachers"", 1950-1960: signing of the Treaty of Versailles on 28 June 1919 in the large gallery of the castle's ice-cream - peace trade between Germany and the Allies, after the First World War - / Patrice Cartier / Photo © Gusman / Bridgeman Images: 311

Science History Images / Alamy Stock Photo: 6, 76, 85, 200, 238, 260, 279a, 288, 303

Stamp Collection / Alamy Stock Photo: Cover D

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Teddy Roosevelt and John Muir (b/w photo) / Underwood Archives / UIG / Bridgeman Images: 227b

The American Rattle Snake, 1782 (engraving) / Gillray, James (1757–1815) / English / Private Collection / The Stapleton Collection / Bridgeman Images: 22

The Espionage Act of 1917 and Sedition Act of 1918 outlawed the use "disloyal, profane, scurrilous, or abusive language" about the United States government, flag, or armed forces during World War 1. In 1922 the children of imprisoned dissidents protested for their release / Everett Collection / Bridgeman Images: 298

The Golden Spike Ceremony, 10th May 1869 (b/w photo) / Savage, Charles Roscoe (1832–1909) / English / Private Collection / Peter Newark American Pictures / Bridgeman Images: 125

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The Rocky Mountains: Emigrants Crossing the Plains, 1866 (colour litho) / Currier, N. (1813–88) and Ives, J.M. (1824–95) / American / Private Collection / Bridgeman Images: 118

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Uncle Sam is expanding, and so is E.E. Strauss & Co.'s business in high art tailoring, c.1898 (colour litho) / American School, (19th century) / American / Private Collection / Bridgeman Images: 248a

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Union Pacific Railroad Poster, c.1880 (colour litho) / American School, (19th century) / American / Private Collection / Peter Newark Western Americana / Bridgeman Images: 124

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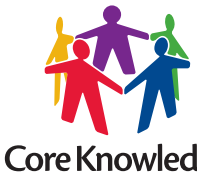

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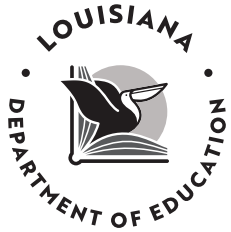

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